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ABSTRACT

This curriculum guide is intended to assist persons teaching a course in employment in agribusiness. Addressed in the individual units of instruction are the following topics: employment information (training plans/agreements and wages, taxes, and fringe benefits); human relations (employer/employee/customer relations and communication skills); business procedures, operating procedures, and customer credit); physical distribution (transportation and warehousing; ordering, receiving, and delivery; and materials-handling equipment); and merchandising (sales and advertising techniques and display). Each unit contains some or all of the following: performance objectives, suggested activities for teachers and students, information sheets, assignment sheets, job sheets, transparency masters, tests, and answers to the tests. (MN)

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Employment in Agribusiness

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EMPLOYMENT IN AGRIBUSINESS

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PREFACE

The Mid-America Vocational Curriculum Consortium (MAVCC) was organized for the purpose of developing instructional material for eleven member states. Priorities for developing MAVCC material are determined annually based on the needs as identified by all member states. One priority identified was *Employment in Agribusiness*, a revision of one of MAVCC's early books.

Since the original publication, *Agriculture Sales and Service*, was released in 1976, it has been well received by teachers and students throughout the country. So that these individuals can continue to use the MAVCC agribusiness material as their basic text, the original book has been technically revised to meet the latest standards. In addition, new information has been added in the areas of physical distribution (transportation and warehousing; ordering, receiving, and delivery; and materials handling equipment) and merchandising (sales techniques, advertising, and display).

The success of this publication is due, in large part, to the capabilities of the writers and representatives who worked with its development. Writers and representatives of each of the member states who brought with them technical expertise and the experience related to the classroom and to the trade. To assure that the materials would parallel the industry environment and be accepted as a transportable basic teaching tool, organizations and industry representatives were involved in the developmental phases of this manual. Appreciation is extended to them for their valuable contributions to the book.

These materials are designed to assist teachers in improving instruction. As this publication is used, it is hoped that the student performance will improve and the students will be better able to assume a role in an agribusiness occupation.

Instructional material in this publication is written in terms of student performance using measurable objectives. This is an innovative approach to teaching that accents and augments the teaching/learning process. Criterion referenced evaluation instruments are provided for uniform measurement of student progress. In addition to evaluating recall information, teachers are encouraged to evaluate the other areas including process and product as indicated at the end of each instructional unit.

It is the sincere belief of the MAVCC personnel and all those members who served on the committee that this publication will allow students to become better prepared and more effective members of the work force.

Ann Benson
Executive Director
Mid-America Vocational
Curriculum Consortium

Larry Barnhardt
Chairman
Board of Directors
Mid-America Vocational
Curriculum Consortium

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The contents of this publication were planned and reviewed by the following members of the Mid-America Vocational Curriculum Consortium agriculture committee:

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We extend a special thank you to Keith Carlson of Agri-Education, Inc., to Arlie Goforth, area manager of the Clyde Coop Association, to Gene Benson of Benson Custom Harvesting, to Willis Wilson and Steven Burhoe of Farmland Industries, and to Ron Nutsch of the Federal Land Bank of Wichita for representing business and industry on this committee.

Gratitude is expressed to the numerous agribusinesses and publishers who provided us with reference materials and to the Graphics Division of the Oklahoma State Department of Vocational and Technical Education for typing, providing artwork, and printing of this publication.

Thanks are also extended to Editor, Jane Huston, and to Mary Kellum and Dan Fulkerson for their assistance in editing and proofreading.

USE OF THIS PUBLICATION

Instructional Units

Employment in Agribusiness includes sixteen units. Each instructional unit includes some or all of the basic components of a unit of instruction: performance objectives, suggested activities for teachers and students, information sheets, assignment sheets, job sheets, visual aids, tests, and answers to the test. Units are planned for more than one lesson or class period of instruction.

Careful study of each instructional unit by the teacher will help to determine:

A. The amount of material that can be covered in each class period
B. The skills which must be demonstrated

   1. Supplies needed
   2. Equipment needed
   3. Amount of practice needed
   4. Amount of class time needed for demonstrations

C. Supplementary materials such as pamphlets or filmstrips that must be ordered
D. Resource people who must be contacted

Objectives

Each unit of instruction is based on performance objectives. These objectives state the goals of the course, thus providing a sense of direction and accomplishment for the student.

Performance objectives are stated in two forms: unit objectives, stating the subject matter to be covered in a unit of instruction; and specific objectives, stating the student performance necessary to reach the unit objective.

Since the objectives of the unit provide direction for the teaching-learning process, it is important for the teacher and students to have a common understanding of the intent of the objectives. A limited number of performance terms have been used in the objectives for this curriculum to assist in promoting the effectiveness of the communication among all individuals using the materials.

Reading of the objectives by the student should be followed by a class discussion to answer any questions concerning performance requirements for each instructional unit.

Teachers should feel free to add objectives which will fit the material to the needs of the students and community. When teachers add objectives, they should remember to supply the needed information, assignment and/or job sheets, and criterion tests.

Suggested Activities for the Instructor

Each unit of instruction has a suggested activities sheet outlining steps to follow in accomplishing specific objectives. Duties of instructors will vary according to the particular unit; however, for best use of the material they should include the following: provide students with objective sheet, information sheet, assignment sheets, and job sheets; preview filmstrips, and arrange for resource materials and people; discuss unit and specific objectives and information sheet; demonstrate procedures in job sheets; give test. Teachers are encouraged to use any additional instructional activities and teaching methods to aid students in accomplishing the objectives.

Information Sheets

Information sheets provide content essential for meeting the cognitive (knowledge) objectives in the unit. The teacher will find that the information sheets serve as an excellent guide for presenting the background knowledge necessary to develop the skill specified in the unit objective.

Students should read the information sheets before the information is discussed in class. Students may take additional notes on the information sheets.

Transparency Masters

Transparency masters provide information in a special way. The students may see as well as hear the material being presented, thus reinforcing the learning process. Transparencies may present new information or they may reinforce information presented in the information sheets. They are particularly effective when identification is necessary.

Transparencies direct the class's attention to the topic of discussion. They should be left on the screen only when topics shown are under discussion.

Assignment Sheets

Assignment sheets give direction to study and furnish practice for paper and pencil activities to develop the knowledge which is a necessary prerequisite to skill development. These may be given to the student for completion in class or used for homework assignments. Answer sheets are provided as necessary, and may be used by the student and/or teacher for checking student progress.

Job Sheets

Job sheets are an important segment of each unit. The instructor should be able to demonstrate the skills outlined in the job sheets. Procedures outlined in the job sheets give direction to the skill being taught and allow both student and teacher to check student progress toward the accomplishment of the skill. Job sheets provide a ready outline for students to follow if they have missed a demonstration. Job sheets also furnish potential employers with a picture of the skills being taught and the performances which might reasonably be expected from a person who has had this training.

Test and Evaluation

Paper-pencil and performance tests have been constructed to measure student achievement of each objective listed in the unit of instruction. Individual test items may be pulled out and used as a short test to determine student achievement of a particular objective. This kind of testing may be used as a daily quiz and will help the teacher spot difficulties being encountered by students in their efforts to accomplish the unit objective. Test items for objectives added by the teacher should be constructed and added to the test.

Test Answers

Test answers are provided for each unit. These may be used by the teacher and/or student for checking student achievement of the objectives.

EMPLOYMENT
IN
AGRIBUSINESS

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)

RELATED INFORMATION: What The Worker Should Know (Cognitive)

SECTION A: EMPLOYMENT INFORMATION

UNIT I: ORIENTATION

1. Terms and definitions
2. Importance of agribusiness and production agriculture to the economy
3. Occupational areas of agricultural agribusiness
4. Means of locating employment
5. Factors to consider when choosing an occupation
6. Steps to take in being employed
7. Steps in making a good decision
8. Personal attributes or attitudes an employer looks for during a personal interview
9. Preparing for an interview
10. Positive ways to begin an interview
11. Special considerations for answering questions clearly
12. Ways to maintain an interviewer's interest
13. Compile a list of employment opportunities in agribusiness in your community
14. Apply steps in making a decision

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
15. Write a resumé	
16. Write a letter of application for employment in agribusiness	
17. Complete an employment application form for a position in agribusiness	
18. Practice interview questions	
19. Make an appointment by phone for an agribusiness employment interview	
20. Write a follow-up letter or make a follow-up phone call after interviewing for an agribusiness position	
21. Evaluate an agribusiness employment offer	
22. Compare employment opportunities	
UNIT II: TRAINING PLAN/AGREEMENT	
	1. Purpose of the training plan
	2. Purpose of the training agreement
	3. Signers of the training agreement
	4. Purpose of a job record
	5. Criteria for job evaluation
	6. Guidelines for student-learner certification
7. Complete a job record sheet	
UNIT III: WAGES, TAXES, AND FRINGE BENEFITS	
	1. Terms and definitions
	2. Legal aspects of employment
	3. Payroll check deductions

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
	4. Methods of obtaining a Social Security card
	5. Benefits paid from Social Security
	6. Features of worker's compensation insurance
	7. Characteristics of unemployment insurance
	8. Fringe benefits that employers may offer
9. Figure take-home pay	

SECTION B: HUMAN RELATIONS

UNIT I: EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS

1. Terms and definitions
2. Reasons why we study personality
3. Steps for changing personality
4. Characteristics of a desirable personality
5. Characteristics of a desirable fellow worker
6. Undesirable personality traits
7. Reasons why people work
8. Ways people are different
9. Ways to get along with people
10. Expectations of an employer
11. Expectations of an employee
12. Ways to get along with the public

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
13. Answer questions concerning human relations with fellow workers	
14. Rate grooming and wardrobe habits	
15. Rate personality	
16. Develop a personality self-improvement plan	

UNIT II: COMMUNICATION SKILLS

	1. Terms and definitions
	2. Types of communication
	3. Factors necessary for effective communication
	4. Ways to achieve effective communication
	5. Causes for failure in communication
	6. Nonverbal communication signals
	7. Proper way to introduce yourself
	8. Ways to get more out of casual conversations
	9. General rules for proper telephone use
	10. Tips for proper telephone use
11. Analyze voice quality	
12. Use proper telephone procedures	

SECTION C: BUSINESS PROCEDURES

UNIT I: BUSINESS ORGANIZATIONS

	1. Terms and definitions
	2. Types of business organizations
	3. Types of cooperative corporations

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
	4. Common types of organizational patterns
5. Complete a business structure worksheet	
UNIT II: BUSINESS MACHINES	
	1. Terms and definitions
	2. Parts of a cash register
	3. Cash drawer arrangement
	4. Parts of a ten-key adding machine
	5. Parts of an electronic calculator
	6. Major microcomputer components and their functions
	7. General uses of the microcomputer
	8. Microfiche system and how to use it
	9. Reasons for checking daily cash balance
	10. Procedure for checking daily cash balance
11. Identify major components of a microcomputer system	
12. Count change	
13. Balance a cash register	
14. Figure sales tax and total amount of sale using an electronic calculator	
15. Use a cash register	
16. Use an electronic calculator	
17. Add and subtract with an electronic calculator	
18. Multiply with an electronic calculator	
19. Use an electronic calculator to figure percentages	
20. Use an electronic calculator to figure discounts	

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)

RELATED INFORMATION: What The Worker Should Know (Cognitive)

UNIT III: SALES PROCEDURES

1. Terms and definitions
2. Reasons for writing a sales ticket
3. Preparing and handling a sales ticket
4. Steps in using a tax table
5. Procedures for counting change
6. Characteristics of a good check
7. General rules for cashing checks
8. Credit card authorization
9. Common denominations
10. Ways to detect counterfeit bills
11. How to report counterfeit money
12. Common practices of a shortchange
13. Ways to avoid the shortchange artist
14. Methods of money manipulation
15. Ways to prevent money manipulation
16. Complete a worksheet on writing sales tickets
17. Prepare sales tickets with discounts
18. Complete a worksheet on accepting checks
19. Accept cash for merchandise
20. Process a credit card sale

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)

UNIT IV: OPERATING PROCEDURES

1. Terms and definitions
2. Ways to maintain inventory control
3. Recording inventory at cost
4. Steps in taking a physical inventory
5. Types of perpetual inventory systems
6. Average inventory
7. Stock turnover formulas
8. Stock-sales ratio
9. Factors affecting prices
10. Formulas used in pricing merchandise
11. Categories of operating expenses for a business
12. Profit and loss statement
13. Ways losses occur
14. Ways to prevent shoplifting
15. Procedures to follow if a robbery occurs
16. Keep a daily running inventory
17. Figure perpetual inventory prices
18. Complete a perpetual inventory form

UNIT V: CUSTOMER CREDIT

1. Terms and definitions
2. Advantages of credit

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
	3. Disadvantages of credit
	4. Types of credit
	5. Factors that determine the cost of credit
	6. Use of the credit application
	7. Tips for filling out a credit application
	8. Information requested on a credit application
	9. Methods of evaluating the credit application
	10. Reasons for credit policy
	11. Ways to maintain effective credit policies
	12. Information included on a monthly statement
	13. Purposes of a monthly statement
14. Calculate interest	
15. Complete a credit application	

SECTION D: PHYSICAL DISTRIBUTION

UNIT I: TRANSPORTATION AND WAREHOUSING

1. Terms and definitions
2. Common types of transportation
3. Selecting transportation
4. Government agencies that regulate transportation
5. Reasons for warehousing
6. Traits of a modern warehouse

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
	7. Plannning a floor layout
	8. Types of warehouse equipment
	9. Safety color codes
	10. Proper handling and storage
	11. Handling and storage of hazardous materials
	12. Practices and procedures for storing food
13. Complete a worksheet on selecting transportation	
14. Sketch a floor plan for a warehouse	

UNIT II: ORDERING, RECEIVING, AND DELIVERY

	1. Terms and definitions
	2. Ways to order merchandise
	3. First rules of receiving
	4. Steps in receiving
	5. Factors affecting the receiving operation
	6. Types of receiving records
	7. Reasons for filing claims
	8. Procedure for filing a claim
	9. Tips for loading and securing merchandise
	10. General rules for customer delivery
11. Complete a purchase order	

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)
12. Complete a worksheet on receiving merchandise	
13. Fill out a claim form	

UNIT III: MATERIALS-HANDLING EQUIPMENT

	1. Terms and definitions
	2. Common types of materials-handling equipment
	3. Types of equipment maintenance operations
	4. Factors affecting equipment operation
	5. General safety rules
	6. Steps in lifting heavy objects
	7. Proper procedures for using a hand truck
	8. Proper procedures for using a forklift truck
	9. Proper procedures for using a ladder
10. Identify proper procedures for using materials-handling equipment	

SECTION E: MERCHANDISING

UNIT I: SALES TECHNIQUES

	1. Terms and definitions
	2. Duties of a salesperson
	3. Abilities of a successful salesperson
	4. Traits of a successful salesperson
	5. Recognizing and helping different types of customers

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do
(Psychomotor)

19. Rate your sales personality
20. Complete a worksheet on determining customer needs
21. Complete a worksheet on overcoming customer objections
22. Solve a problem concerning prospecting techniques
23. Solve a problem dealing with the importance of good sales techniques
24. Evaluate a sales demonstration
25. Prepare and give a sales demonstration

RELATED INFORMATION: What The Worker Should Know
(Cognitive)

6. Buying motives
7. Basic buying decisions of the customer
8. Common types of sales resistance
9. Importance of product knowledge
10. General areas of product knowledge
11. Sources of product information
12. Sources of prospect names
13. Steps in selling
14. Stages of sale
15. Do's and don'ts of a successful sales presentation
16. Basic rules for a successful demonstration
17. Do's and don'ts of closing a sale
18. Handling complaints and adjustments

JOB TRAINING: What The Worker Should Be Able to Do (Psychomotor)	RELATED INFORMATION: What The Worker Should Know (Cognitive)

UNIT II: ADVERTISING

1. Terms and definitions
2. Objectives of advertising
3. Advantages and disadvantages of advertising
4. Major advertising media
5. Supplementary forms of advertising media
6. Selecting advertising media
7. Requirements of effective advertising
8. Benefits of advertising
9. Determining when to advertise
10. Major parts of an advertising layout
11. Procedures for preparing a newspaper advertisement
12. Layout techniques
13. Characteristics of good copy
14. Career opportunities in advertising
15. Prepare an advertising schedule
16. Prepare a newspaper advertisement
17. Write and record a radio spot announcement

UNIT III: DISPLAY

1. Terms and definitions
2. Functions of a display
3. Advantages of displays

INSTRUCTIONAL/TASK ANALYSIS

JOB TRAINING: What The Worker Should Be Able to Do
(Psychomotor)

15. Plan a display
16. Construct a display

RELATED INFORMATION: What The Worker Should Know
(Cognitive)

4. Types of displays
5. Basic display arrangements
6. Locations for interior displays
7. Elements of good display design
8. Principles of display design
9. Common display materials
10. Functions of a show card
11. Procedures for planning and creating a display
12. Guidelines in setting up interior displays
13. Ways to maintain a display
14. Career opportunities in display

EMPLOYMENT IN AGRIBUSINESS

GLOSSARY

Advancement — Promotion or elevation to a higher position

Advertising (ad) — A paid announcement that informs and educates consumers so that they may choose more wisely from the variety of goods and services now on the market

Advertising budget — Estimate of the amount of money to be spent on advertising during the year; usually based upon a percentage of last years sales

Advertising schedule — A written plan, based on a set amount of time, which indicates when advertisements are scheduled to appear

Aging an account — Process for keeping track of and collecting overdue accounts

Agribusiness — Firm or economic enterprise organized to produce and sell services and supplies to farmers for use in farm production and farm living

Agriculture production — Science or art of cultivating the soil, producing crops, raising livestock, and all other aspects of preparing these products to move from producer to consumer

Ambition — The desire to achieve to attain one's goals

Amortized — Regular schedule of payment of the loan

Application form — Printed form on which job applicants record information about their personal history, job history, job experience, education, and references

Appraisal — A fair market value given on personal property

Attitude — A feeling or emotion toward a person or thing

Award — Recognition received for outstanding achievement

Balance — To equalize the weight of the illustrations and content in an advertisement; the arrangement of a display so that equal attention is given to all items and parts of the display

Basic stock list — List of merchandise that is to be kept in stock at all times

Bill of lading — Document prepared by the carrier listing goods shipped and other details such as quantity and weight

Break-even-point — Volume of sales where the revenue received covers costs and all future sales represent profit

Bulk discount — Discount given for buying in large amounts

Buying motives — Advantages that people want and the reasons that cause them to buy

Buying signals — Indications from a customer that he/she is nearing the decision to buy

Capital — Net worth; accumulated possessions calculated to bring in income

Carload lots — Shipment that completely fills a freight car and is charged lower rates

Carrier — An individual or organization engaged in transporting goods for a fee

Cash discount — Discount given for paying cash for merchandise

Cash register — Machine which indicates the amount of each sale and records the amount of money received; usually has a change drawer and may automatically make change

Change bank — Amount of money placed in cash register for use during the day

Claim — A written form which is filed by receiver asking for compensation due to damaged or incorrect orders

C.O.D. — Cash on delivery

Collateral — Livestock, land, and other personal property used to secure the loan

Commodities — Products of agriculture or mining such as grains or coal

Communication — Transfer of ideas, feelings, and attitudes by which meaning is conveyed from one person to another

Confidence — Faith or trust in one's actions and abilities

Containerization — To ship goods in sealed, portable containers by rail, road, air, or sea

Conveyor — Mechanically operated equipment, either fixed or mobile, which moves merchandise between two points in a fixed line of travel

Cooperative — Voluntary contractual organization of persons having a mutual ownership interest in providing themselves a needed service on a non-profit basis

Corporation — A body formed and authorized by law to act as a single person although constituted by more than one person and legally endowed with various rights and duties

Cost code — Way cost of merchandise is placed on the sales ticket for inventory and other planning and control functions

Cost of goods sold — Amount paid for merchandise, including all shipping costs

Counterfeit bill — Money made by an individual but not approved by the U.S. government

Credit — Allows the customer to purchase goods and services in return for a promise to pay later

Credit application — A form used by firms to gather information that will be used in determining whether or not to grant credit

GLOSSARY

Credit Bureau — An agency that collects and keeps information on consumers that is used to determine whether or not to grant credit

Credit card — A card allowing a customer to charge or delay payment on purchases made

Creditor — The person or firm to which one owes money

Decision making — Reaching a conclusion about something after considering a set of facts, reasons, and alternatives

Denomination — Value or size of a piece of money

Depreciation — A decline in value of an asset due to such causes as wear, tear, and obsolescence which is recognized as a business expense and part may be considered an exemption from income tax

Display — The art of communicating with people visually in order to get their attention so that they will consider the purchase of a product

Display sketch — The blueprint which shows what it will look like and what is needed to assemble the display

Dividend — A share in profits based on the amount of stock owned by an individual

Down payment — The amount of money given the creditor as the first payment

Early season discount — Discount for buying merchandise before season

Egotism — The practice of talking about oneself too much; an exaggerated sense of self-importance

Electronic calculator — Device used for performing mathematical calculations electronically

Empathy — Putting self in other person's position; participating in another person's feelings or ideas

Employment office — Business that is designed to help individuals find employment

Enthusiasm — Excitement in performing an activity

Equal opportunity employer — Employer who is making a special effort to assure that no form of discrimination is practiced

Exploit — To make unethical use of another person for one's own advantage

Extension — Amount indicated in last column of a sales ticket; it may be the unit price of a single item or the combined cost figured by multiplying quantity times unit price

Extracurricular activities — Clubs, organizations, and social or church groups in which one participates

Feedback — Returning to the beginning source; finding out how one did

F.I.C.A. — Federal Insurance Contributions Act; Legislation governing Social Security, disability insurance, and Medicare

Finance charge — Amount of money charged to customer by retailer for goods and/or services purchased on credit

Fire wall — A wall constructed to prevent the spread of fire

Fixed cost (flat expenses) — Expenses that are about the same for every article regardless of its cost or selling price

Examples: Receiving, marking, wrapping, delivery, labor

F.O.B. — Free on board; without charge for delivery to and placing on board a carrier at a specified point

Formal balance — Elements are spaced evenly on both sides in an ad or display

Forklift truck — Vehicle designed to pick up, carry, and stack large loads of merchandise and equipment

Fringe benefits — Extras provided by an employer, such as paid vacations, sick leave, and insurance protection

Grapevine — Informal communication system that exists in all organizations; may be helpful or harmful depending on how it is used

Good grooming — Having a clean and neat appearance and wearing conservative clothes that are suitable to the business

Gross — Overall total before deductions are subtracted

Gross margin (maintained margin) — Difference between net sales and cost of goods sold

Gross sales — Total amount of goods or services sold

Hand truck — Manually operated piece of equipment used for hauling short distances and is generally limited to low-volume handling and bulky items such as sacks of feed or large cartons

Help wanted ad — Classified advertisement telling what position is available and what the qualifications are

Honesty — Fairness of conduct

Human relations — A study of human problems designed to develop better interpersonal relationships

GLOSSARY

Informal balance — Elements of an ad or display not spaced the same on both sides but which appear balanced by varying the distance of larger, heavier elements, various shapes, and colors

Initiative — Ability to take action independently without outside influence or control

Institutional advertising — Promoting a business as a good place to buy because it measures up to certain standards

Integrity — Fairness of conduct; firm adherence to a code of high moral conduct

Interest rate — Percentage charged for the use of money

Interview — Meeting of employer and job applicant for purpose of evaluation and questioning

Inventory — An itemized list of goods with their estimated worth

Invoice — An itemized list of goods shipped specifying price and the terms of sale

Invoice apron — A record of shipment attached to the invoice when goods are received

Invoice register — Record of incoming invoices

I.R.S. — Internal Revenue Service; government agency which collects income tax and FICA payments from employers

Job description (position description) — Written statement outlining responsibilities of an individual within a business or industry

Layout — The arrangement of elements that will appear in the finished advertisement

Leader — An item of timely interest that is competitively priced to draw customers into the store

Leadership — The ability to positively influence another person to meet a common goal

Legible — Capable of being read; clear

Less than carload lots — Shipment that does not fill a freight car and will cost higher rates than a carload lot

List price — Basic price of an item as published in a catalog or price list; may be subject to trade or quantity discounts

Logotype — An identifying symbol of a business which is used for advertising

Loyalty — Faithfulness to co-workers and the business

Maintenance — Any actions necessary to keep equipment in a safe and serviceable condition

Manipulate — To handle by an artful or unfair method to deceive

Margin — Difference between net sales and cost of merchandise sold

Markdown — Reduction of selling price to a lower price

Markup (mark-on, initial markup) — Amount added to the cost of goods to arrive at the original selling price

Materials-handling equipment — Stationary or mobile equipment, powered mechanically or by hand, that is used for physical handling, storage, and movement of materials, merchandise, and supplies

Maturity — Date the loan is to be paid in full

Media — The ways to reach people through advertising

Memo — Written announcement sent to members within an organization

Microcomputer — Small but complete computer system capable of accepting information, applying processes to information, and data and supplying results of these processes

Microfiche card — Sheet of microfilm containing rows of microimages of pages of printed matter

Microfiche reader — Machine which magnifies microimages and projects them on a screen so that printed matter is easy to read

Mortgage — A written claim listing the collateral to secure the loan

Need — The lack of something that is required or essential

Net — What is left after all expenses and losses are deducted

Net profit — Amount of money left after payment of all costs and expenses other than income taxes

Net sales — Gross sales less any returns or adjustments

Optical center — Spot slightly above and to the left of the precise center of the layout space

Oral expression — The ability to communicate one's thoughts and ideas to another individual in a manner in which it can be easily understood

Organization — An administrative and functional structure such as a cooperative or corporation

Overtime — Work performed beyond a 40-hour work week in which an employee is usually paid 1 1/2 times regular pay rate

Packing slip — Lists contents of package and gives purchase order number

Pallet handlift truck — Used to move pallet loads that do not have to be stacked and where short hauls are required

GLOSSARY

Partnership — A legal relationship existing between two or more persons contractually associated as joint principals in a business

Peer pressure — The psychological need to be accepted by others in one's own age group or by others of one's own social of vocational status

Pension — A fixed sum paid to an individual following retirement from service

Perpetual inventory card — Record kept of each item showing the amount of merchandise put in stock, withdrawn, and on hand at any particular time without the necessity of taking a physical count

Perserverance — To continue in a job or action despite opposition or discouragement

Personal check — Check given by a customer to pay for merchandise

Personality — The sum of all specific traits that are consistently observable in an individual's behavior

Personal selling — The presentation of goods or services on a personal or face-to-face basis

Physical inventory — Actual count of the goods in stock, usually taken two to four times a year

Piggyback — To ship goods or commodities already in a trailer or a flat car

Point-of-sale system — Electronic cash register system wired to a computer which provides additional information on the sales receipt; records sales, changes in inventory, and cash supply in the accounting office

Poise — Handling oneself in a self-assured, easy going manner

Preventive maintenance — Systematic care, inspection, and servicing of equipment to keep it usable

Prime time — Time when the largest number of people listen to the radio or watch television and, thus, the time when it is most expensive to advertise

Principal — Amount of money borrowed

Product knowledge — Facts about a product which can be translated into specific benefits that fulfill the customer's needs or wants

Profit sharing — Process under which employees receive a part of the profits of an industrial or commercial business

Promotion — Coordination of all seller-initiated efforts to establish communication with potential customers

Promotional advertising — A form of advertising which is used to convince people to buy specific goods and services in a particular business

Prop — Fixture used to build a display

Prospecting — The process of looking for new customers through various means

Publicity — Any nonpaid coverage of a store or product by the media

Purchasing agent — Individual in charge of purchasing for a business

Purchase order — Written request for goods which lists item specifications such as type, quantity, price, and date needed

Qualifications — Experience, education, and physical characteristics which suit a person to a job

Quantity discount — Discount given for buying large volumes of merchandise

Radiation display — Arrangement of products so that they radiate out from the center

Receiving dock — Platform where transportation vehicles are unloaded

Resourcefulness — Ability to take action quickly in a new situation or unexpected difficulty

Responsibility — Carrying out promises or obligations one has made and seeing a job through

Resumé — Brief, typed summary of one's qualifications, experience, and personal background that is used in applying for a job

Sales tax — A certain percent of the total bill

Sales ticket — List of merchandise sold, stating customer's name and address, items, quantity, price, tax, and terms of sale; used as a permanent record for customer and business

Scanner — Instrument that reads information from the Universal Product Code; held in the checker's hand or built into the countertop

Selling — The process of determining the needs and wants of a customer and presenting a product, service, or idea in such a way that customer is motivated to make a favorable buying decision

Serial numbers — Numbers on denominations of paper money which identifies them

Share — Any of the equal interests or rights into which the entire stock of a corporation is divided and ownership is evidenced by one or more certificates

Shipper — An individual or organization that sends goods by means of a carrier

Shortchange artist — A person who is an expert in cheating the cashier by confusion and distraction

GLOSSARY

Show cards — Signs used in displays to give information about the featured merchandise

Simple interest — Interest charged only on the balance that is outstanding on the loan; payment is deducted from the principal before interest is figured the next time

Skid handlift truck — Manually operated piece of equipment similar to a pallet truck, except it has a platform rather than forks and is used to transport skids rather than pallets

Social Security Program — Method of providing income to individuals when earnings are reduced or stopped as a result of retirement, disability, or death

Spot announcement — A brief selling message delivered between sponsored programs which lasts from 10 to 60 seconds

Stock count — Counting items before advertising or re-ordering

Stockholder — A person owning one or more shares in a business

Stock-sales ratio — Relationship of retail stock to the sales for that month

Suggested retail price — Retail price paid by customer which has been suggested by the manufacturer

Tact — Knowing what to do or say in a given situation to avoid offending others; maintaining good relations with others

Ten-key adding machine — Machine used to add several figures together to provide a total amount

Touch method — Operating a cash register using specific finger positions for faster speed, rhythm, and accuracy

Trade association journals — Publications printed by various non-profit organizations to disseminate information about an industry

Trait — A distinguishing quality or characteristic that contributes to personality

Trial close — A test to see if the customer is ready to buy

Turnover — Number of times during a given period that the average amount of stock on hand is sold and replaced

Typeface — The design or shape of the letters used in printing a headline or the copy of an ad

Unethical — Not conforming to accepted professional standards of conduct

Unit pricing — Price per item

Universal Product Code — Set of numbers printed on a package to identify particular product, manufacturer, and price information when scanned by a point-of-sale cash register system

Usry law — Law which prohibits lender from charging the borrower an interest rate in excess of a legal rate for the use of money

Values — Personal principles which influence an individual's actions

Variable costs — Expenses that are different for each item but are approximately the same percentage of the selling price

Vocational preparation — Any vocational courses and skills one has learned in school or through job experience

Wage — Payment of money for labor or services, usually on an hourly basis

Want — A desire, craving, or conscious longing that may not be essential

Warehouse — A structure or building used in the storage of merchandise or commodities

Warehousing — The practice of receiving, storing, and stocking merchandise or commodities

Waybill — Document given details of shipment which is prepared by a carrier when there is more than one carrier involved

Wholesale price — Price paid for goods purchased in quantity by retailer from wholesaler for resale

Withholding taxes — Money deducted from an individual's paycheck which is sent to the federal government for the employees income tax payment

Worker's compensation — A law which requires employers to take responsibility and cover employees in the event of an injury resulting from an accident which occurs as a result of or in the course of worker's employment

EMPLOYMENT IN AGRIBUSINESS

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(NOTE: An activity guide is available for purchase with the text.)

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ADDITIONAL MATERIALS

(NOTE: This is an alphabetical list of materials which would be beneficial as supplementary teaching aids.)

American Institute of Cooperation, Suite 504, 1129 20th St. N.W., Washington, D.C. 20036.

Career Aids, Inc., 8950 Lurline Avenue, Dept. TE, Chatsworth, CA 91311.

(NOTE: A catalog entitled *Multimedia Materials for Occupational, Vocational, and Career Education,* may be obtained by writing to the address above.)

Educational Department, Farmland Industries. P.O. Box 7305, Dept. 169, Kansas City, MO 64116.

(NOTE: Farmland Industries has films and educational games to help students learn about business organizations and the various methods of doing business.)

Farmer Cooperative Service, U.S. Department of Agriculture, Washington, D.C. 20250.

Film. "Win More Friends by Telephone". American Telephone and Telegraph Company.

Films. Bell Telephone Co. or the public phone company in your area.

(NOTE: The following films are available to teachers in the state of Oklahoma by contacting their local Bell Telephone marketing/sales representative.)

1. "I Rather Like You Mr. Bell"
2. "If the Shoe Fits"
3. "How to Lose Your Best Customer"

Film series. "The Art of Communication". Photocom Productions, P.O. Box 3135, Pismo Beach, CA 93449.

Multimedia Materials for Occupational, Vocational, and Career Education. A catalog of teaching aids such as computer programs, film strips, cassettes, teacher guides, and workbooks which are available from Career Aids, Inc., 8950 Lurline Avenue, Department TE, Chatsworth, CA 91311.

Examples:
1. Choosing Careers
2. Job Readiness
3. Introducing the Working World
4. Finding and Keeping a Job
5. Job Interviewer Kit

Slide presentation. "Safety Color Coding for the Shop". 1982. American Association for Vocational Instructional Materials, Engineering Center, Athens, GA 30602.

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NOTE: THE FOLLOWING PAGES HAVE BEEN INCLUDED IN THIS PUBLICATION AS A SUPPLEMENT TO SECTION A — UNIT II: TRAINING PLAN/AGREEMENT AND REPRESENT EXAMPLES OF TRAINING PLANS AND AGREEMENTS, JOB PLACEMENT APPLICATIONS, WEEKLY JOB REPORTS, STUDENT EVALUATION SHEETS, AND TEACHER RECORD SHEETS WHICH MAY BE ADAPTED FOR YOUR PROGRAM.

____
(Date)

APPLICATION FOR CONDUCTING A PLACEMENT EXPERIENCE PROGRAM

Name _______________ (Last) (First) (Middle)

Date of Birth _______________ (Day) (Month) (Year) Social Security Number _______________

Address _______________ Telephone Number _______________

Grade in School _______________

In case of emergency, indicate parent or guardian to be contacted: _______________

Home Telephone _______________ Address _______________

Business Telephone _______________

Explain any handicaps or health problems either sensory, mental, or physical which may affect work performance or which should be considered in determining job placement.

____

____

____

Why do you wish to enroll in this program? _______________

____

What subjects have you enjoyed most? _______________

What subjects have you enjoyed least? _______________

List the hours available for work _______________

____

Previous Work Experience			
Date	Employer	Address	Type of Work

Present number of credits _______________

Required subjects to graduate _______________

List References (only one of which may be a teacher)

Name	Address	Telephone	Business or Occupation

Student's Signature ______________________________

Parent's Signature ______________________________

OCCUPATIONAL PREFERENCE

Please list in the order of your preference the firm or individual for whom you would like to work as a student-trainee:

First choice: ______________________________

Second choice: ______________________________

Third choice: ______________________________

PRESENT HIGH SCHOOL SCHEDULE

PD.	SUBJECT	TEACHER	ROOM
1			
2			
3			
4			
5			
6			

OCCUPATIONS SURVEY OF JOB OPPORTUNITIES AND TRAINING POSSIBILITIES

____________ High School
Vocational Agriculture Department

1. Name of establishment ____________________

2. Address ____________ Company function ____________________

3. Name and title of person interviewed ____________________

4. Estimated percent of gross income that is agriculturally oriented ____________
Number of years company has been in business ____________________

5. Total number of employees ____ Number needing an ag. background ____________

6. Classification of employees with ag. background: (use back if more space needed)

	Number Employed				
	Now		Next 5 Years		
Type of Job (Job Title)	Vo-Ag	Non Vo-Ag	Vo-Ag	Non Vo-Ag	Annual Turnover

7. Can this firm hire high school age personnel? ____ (If no, go to line 11)
Do you have a minimum age? ____ If so, what? ____

8. Would your firm cooperate as a training station for high school vo-ag students placed during school hours? ____ Number ____ After school/Saturdays/vacation only? ____ Number ____ (employed under supervision of school instructor to enable students to learn about occupations within this firm)

9. Would a student employee be insured by your firm? ____ School Insurance required ____

10. What training in vo-ag would be provided prior to and during the above training period:
____

11. I prefer prospective employees for agricultural positions with:*

a.	Farm background	Y	N	NP	d.	Post-high graduate	Y	N	NP
b.	Vo-Ag background	Y	N	NP	e.	College graduate	Y	N	NP
c.	High school graduate	Y	N	NP					

12. Comments: ____________________

*Y = Yes; N = No; NP = No Preference

CHECK SHEET FOR SELECTING TRAINING STATIONS

____________________ High School

Vocational Agriculture Department

Establishment ____________________ Address ____________________
Date ____________________ Phone No. ____________________

FACTORS	**Poor**	**Fair**	**Good**	**Very Good**	**Outstanding**
Type of occupation for student's occupational objective					
Opportunities for rotation					
On-the-job supervision					
Working conditions					
Reputation					
Business climate					
Hours of employment					
Facilities and equipment					
Accessibility					
Wages					
Willing to take time for conferences					
Acquainted with policy of SOE					

Remarks: ____________________

____

____

____

____

Overall Rating: Outstanding ________ Very Good ________ Good ________
Fair ________ Poor ________

"ON-THE-JOB TRAINING"
MEMORANDUM OF TRAINING

Program ______________________ School ______________________

Training Station ______________________ Date ______________________

Address ______________________ Telephone No. ______________________

Student-Trainee ______________________ Date of Birth ______________________

Grade ____________ Work Hours ______________________

Occupational Objective ______________________ Training Period ____________ Mos. or Wks.

Parent or Guardian ______________________ Phone (Res.) ______________________

Phone (Bus.) ______________________

Address ______________________

Business Address ______________________

1. The cooperating firm will employ the above student-trainee on a part-time basis and will provide training which will help him or her realize his or her occupational objective according to a mutually developed training plan.
2. The school will provide organized vocational and related courses of study which will meet the needs of the student-trainee.
3. The cooperating training station will assist the teacher by giving pertinent information which will assure the successful progress of the student-trainee.
4. The training program will extend over a period of ________ months or ________ weeks.
5. The student-trainee, in order to receive high school credits which will apply toward his or her graduation, must be employed a minimum of 15 hours per week and meet the requirements of the school as to class work.
6. The parents (or guardians) will assume full responsibility for any action or happening pertaining to the student-trainee from the time he or she leaves school until he or she reports to his or her training position.
7. The parents (or guardians) will be responsible for the personal conduct of the student-trianee while participating in the on-the-job training program.
8. The parents (or guardians) and student-trainee understand that the part-time on-the-job training program is organized and maintained primarily for high school students (16 years of age or over) who are currently enrolled in, and satisfactorily fulfilling the requirements of, an approved trade and industrial education program.
9. The schedule of compensation shall be mutually agreed upon by the cooperating training firm and the student-trainee.
10. The student-trainee agrees to abide by all the rules and regulations set forth by the teacher and training sponsor (employer).
11. The teacher and training sponsor (employer) will work closely together on all problems concerning the mutual welfare of all parties concerned and especially for the successful progress of the student-trainee.
12. The teacher will at regular intervals (at least once each four weeks) observe the student-trainee while at work and check with the training sponsor in order to assure successful occupational progress.
13. The student-trainee must report to his/her trade class a minimum of one class period every two (2) weeks for trade class-related study and consultation by the teacher.

We, the undersigned, indicate by the affixing of our signatures that we have read and understand the purpose of intent of this "Memorandum of Training."

By: ______________________ ______________________
Employer Teacher

______________________ ______________________
Parent or Guardian Student-Trainee

*NOTE: COMPLETE IN TRIPLICATE: White copy to training station
Green copy to teacher
Yellow copy to student's parent or guardian

TRAINING STATION AGREEMENT

Student ______________________ Date of Birth ______________________
Occupational Objective ______________________ Soc. Sec. No. ______________________
Training Agency ______________________ Date ______________________
Address ______________________ Telephone Number ______________________
Dept. in Which Employed ______________________ Job Supervisor ______________________
Parent or Guardian ______________________ Res. Tel. ____________ Bus. Tel. ____________
Address: Residence ______________________ Business ______________________

1. The student agrees to:

______ a. Do an honest day's work.
______ b. Be punctual, properly attired and groomed, and loyal.
______ c. Follow instructions, avoid unsafe acts, and be alert to unsafe conditions.
______ d. Be courteous and considerate of the employer, customers, and others.
______ e. Keep required records of cooperative training program.
______ f. Be alert to perform assigned tasks which promote the welfare of the business.
______ g. Contact the teacher-coordinator before resigning.

2. The parents agrees to:

______ a. Placement of the student in this cooperative training station.
______ b. Provide a method of getting the student to and from work.
______ c. Assist in promoting the value of the student's experience by cooperating with the employer and teacher when needed.
______ d. Assume full responsibility for any action or happening pertaining to student-trainee from the time he leaves campus until he reports to his training station.

3. The teacher-coordinator, in behalf of the school, agrees to:

______ a. Give systematic instruction at the school related to the student's duties and responsibilities in the training station.
______ b. Visit the student on the job at intervals for the purpose of supervising him.
______ c. Show discretion as to time and circumstances for visits, especially when the work of the training station is pressing.

4. The employers agrees to:

______ a. Provide the student with opportunities to learn how to do well many jobs in this business.
______ b. Assign the student new responsibilities according to his ability and progress.
______ c. Assist the teacher to make an honest appraisal of the student's performance and progress.
______ d. Avoid subjecting the student-trainee to unnecessary hazards.
______ e. Contact the teacher-coordinator before discharging the student.

5. All parties agree to:

_____a. The length of cooperative training period will include a minimum of __________ hours commencing ______________________________ and terminating __________.

_____b. Working hours during the cooperative training period will normally be:
From: __________ To: __________ During school days ______________
From: __________ To: __________ On other days __________________

_____c. A beginning wage of __________ per hour.

We, the undersigned, indicate by affixing our signatures that we have read and understand the purpose and intent of this Training Station Agreement.

Student ______________________________ Employer ______________________________

Parent ______________________________ Teacher ______________________________

TRAINING PLAN

Page _____ of _____

____
Student's Name

Year ________ Training Program for ______________________________
Type of Agribusiness or Occupation

____
Name of Training Center

INSTRUCTIONS: Student — Place check under level of performance when performing that skill level for the first time.

KEY: O — Observed, H — Helped, P — Performed, C — Can Perform Without Supervision

COMPETENCIES (Skills)	Level of Performance			
	O	H	P	C

COMPETENCIES (Skills)	Level of Performance			
	O	H	P	C

COMPETENCIES (Skills)	Level of Performance			
	O	H	P	C

COMPETENCIES (Skills)	Level of Performance			
	O	H	P	C

STUDENT TRAINING PLAN/EVALUATION FORM

Training Station ____________________

Job Title ____________________

Student's Name ____________________

Training Plan Completed ________ Evaluation Completed ________

RATING KEY

4 - Skilled
3 - Moderately Skilled
2 - Limited Skill
1 - Not Satisfactory
0 - Not Covered

Check Task To Be Performed	Task No.	Task	On The Job	Classroom	Individual	Rating			
						1st	2nd	3rd	4th
	1								
	2								
	3								
	4								
	5								
	6								
	7								
	8								
	9								
	10								
	11								
	12								
	13								
	14								
	15								
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	19								
	20								
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	22								
	23								
	24								
	25								
	26								
	27								
	28								
	29								

Check Task To Be Performed	Task No	Task	On The Job	Classroom	Individual	Rating			
						1st	2nd	3rd	4th
	30.								
	31.								
	32.								
	33.								
	34.								
	35.								
	36.								
	37.								
	38.								
	39.								
	40.								
	41.								
	42.								
	43.								
	44.								
	45.								
	46.								
	47.								
	48.								
	49.								
	50.								
	51.								
	52.								
	53.								
	54.								
	55.								
	56.	Quality of work							
	57.	Attitude toward work							
	58.	Personal appearance							
	59.	Human relations							
	60.	Dependability							

	Length of Training		
	From		
Training Sponsor	To		Teacher

TO THE EMPLOYER:

During the term of the "Memorandum of Training" between the "Cooperative Firm" and the "Student-Trainee," we would appreciate your cooperation in completing this form. This will help us evaluate the student-trainee.

The report is brief and should be mailed to the participating teacher the first day of each month. Forms for evaluation and stamped, self-addressed envelopes are provided for your convenience. Please send one report each month. Thank you for your cooperation.

Please rate the "Student-Trainee" in the following areas:

Excellent - 1
Good - 2
Average - 3
Fair - 4
Poor - 5

	1st Week	2nd Week	3rd Week	4th Week
1. Personal Appearance				
2. Attitude Concerning Work				
3. Attitude Concerning Others				
4. Ability to Perform Required Tasks				
5. Responsibility				
6. Dependability				
7. Initiative				

Comments regarding outstanding qualities or deficiencies.

Please mark the "Student-Trainee" attendance record.

FROM (Date) ______________________ TO (Date) ______________________

	Monday	Tuesday	Wednesday	Thursday	Friday
1st Week					
2nd Week					
3rd Week					
4th Week					

Use "A" for absent. Use "T" for tardy or late to work.

Student-Trainee Name ____

Supervisor ____

TEACHER'S RECORD

ON-THE-JOB TRAINING

M F ______________________ Grade ________

Name ______________ Soc. Sec. ______________ Phone ________

Blood Type ______________ Address ______________

Age ______________ Date of Birth ______________

Parent or Guardian's Name ______________ Employer ______________

Phone ______________ Your Training Station ______________

Manager ______________ Immediate Supervisor ______________

Date Work Permit Issued ______________

Date Memorandum of Training Complete ______________

Address ______________ Phone ______________

Period Subject Teacher Room

1. ______________
2. ______________
3. ______________
4. ______________
5. ______________
6. ______________
7. ______________

Occupational Objective ______________

Employment Schedule

Sun ________ Fri ________
Mon ________ Sat ________
Tues ________
Wed ________
Thurs ________

TRAINING STATION VISITS

Date	Comments

Grading Periods

	1st	2nd	3rd
Total Hours Worked			
Average Rate Per Hour			
Total Wages			

______________________ High School
Vocational Agricultural Department

TEACHER-COORDINATOR'S VISITATION RECORD

Training Station ________________________________ Official Contact ________________

Student ____

Date ______________________ Time of Visit ____

	Points to Observe	Comments
1.	Conditions of establishment	
2.	Attitude of workers toward teacher-coordinator and trainee	
3.	Specific operations in which trainee is engaged	
4.	Immediate related subject matter needed	
5.	Personal appearance of the trainee	
6.	Apparent interest of trainee in work	
7.	Apparent interest of employer in trainee	
8.	On-the-job instruction being given	
9.	Other comments	

STUDENT WEEKLY REPORT

Trainee ______________________ Date ______________________

1. What mistakes did you make? How did you handle the situation?

2. What problems came up on which you would like help or class discussion?

3. What materials did you study outside the classroom that complimented your working experience?

4. List some experiences or information that helped to make you a better employee.

5. Agribusiness Skills developed on the job.

	Agribusiness Skill	Description
1.		
2.		
3.		
4.		
5.		
6.		

Wages earned:
Number of hours ____ × Income ____ (per hour) = Gross income $______________

SUMMARY OF DAILY ACTIVITIES

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

PLACEMENT PROGRAM WEEKLY REPORT*

Student-Trainee ____________________ Training Station
Week Beginning ______________ to ______________

WEEKLY TIME AND DUTY SUMMARY				
	Time In	Time Out	Hours Worked	Major Duties Performed
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Total Hours Worked ____ Signature ____________________
Student-Trainee

STUDENT COMMENTS: (New skills, mistakes, difficulties)

*Turn in to vocational agricultural teacher each week.

REQUEST FOR TIME OFF

Trainee ______________________________ Date ________________

Requests permission to take time off (date) ______________________________

for (purpose) ______________________________

If you think this request is reasonable, and feel that the trainee's record merits this consideration, please indicate your permission for this arrangement by signing on the space below.

Remarks: ______________________________

____

____

Signed ______________________________
Vocational Agriculture Teacher

Signed ______________________________
Employer

58

EMPLOYER'S PERIODIC RATING FOR STUDENTS IN OFF-FARM AGRICULTURAL OCCUPATIONS

Student ______________________________ Date __________

Training Station ____________________ Rated by __________________

Directions: Please circle one of the numbers (1 through 10) opposite each of the five factors in the left-hand column which you think most nearly indicates the trainees rating for the past six weeks school period.

FACTORS	UNSATISFACTORY	BELOW AVERAGE	AVERAGE	ABOVE AVERAGE	EXCELLENT
Progress Has he advanced in skill and knowledge during the past six weeks?	1 2 Has made almost no progress.	3 4 Has progressed in only a few phases of his training.	5 6 Has made average progress in his training.	7 8 Has advanced beyond expectations.	9 10 Exceptional progress made in skills and knowledge.
Initiative Can he originate and carry out his ideas?	Has to be told everything to do.	Seldom goes ahead on his own.	Goes ahead on routine matters.	Frequently looks for additional work to do.	Always finding jobs that need to be done.
Reliability Can the student be depended upon in his work?	Can seldom be relied upon.	Frequently fails to come through.	Can be relied upon in most cases.	Only occasionally fails to come through.	Can be relied upon implicitly in all matters.
Work Attitude Does he have a good attitude toward his work?	Bored; shows little enthusiasm.	Rationalizes his shortcomings and mistakes.	Normally enthusiastic about his work.	Tries to improve his work in most cases.	Is always alert to finding ways of improving.
Cooperation Does he work well with others?	Always wants his own way; hard-headed.	Hard for others to work with.	Usually congenial and easy to work with.	Works well with his associates.	Cooperates fully in all matters.

Additional Remarks

____________________ High School
Vocational Agriculture Department

Trainee ____________________ Date ____
Training Station ____________________
EVALUATION ____________________

EMPLOYER-TEACHER EVALUATION

Instructions: Please rate the trainee on each of the competencies (abilities) listed below. Rate by placing a check mark in the appropriate column to the right of each item. Use the following key for rating.

x — No chance to observe
1 — Below average
2 — Average
3 — Above average
4 — Excellent
5 — Superior

GENERAL COMPETENCIES (Abilities)	x	1	2	3	4	5
Accepts and carries out responsibilities						
Attitude toward work; use of work time						
Adaptability; ability to work under pressure						
Speed and accuracy of work						
Attentiveness to work being done						
Promptness in reporting to work						
Care of work space						
Care of materials and equipment						
Observing, imagination						
Attitude toward customers						
Attitude toward fellow workers, supervisors						
Personal appearance, grooming, fitness						
Initiative						
Enthusiasm						
Cheerfulness, friendliness						
Courtesy, tact, diplomacy, manners						
Helpfulness						
Honesty, fairness, loyalty						
Maturity, poise, self-confidence						
Patience, self-control						
Sense of humor						
Selling ability, personality for selling						
TOTAL						

JOB SKILLS	x	1	2	3	4	5
Knowledge of merchandise						
Mathematical ability						
Penmanship						
Speech, ability to convey ideas						
Stock keeping ability, orderliness						
Use of good English						
Desire to serve farm people						
Like people, not afraid of people						
Fill orders						
Check incoming freight						
Mark merchandise for sale						
Use adding machine						
Writing sales slips						
Making sales						
TOTAL						

Rating liabilities:

x — No opportunity to observe
1 — Not noticeable
2 — Seldom noticed
3 — Frequently noticed
4 — Highly noticed
5 — Pronounced

LIABILITIES	x	1	2	3	4	5
Annoying mannerisms						
Familiarity						
Making excuses						
Tendency to argue						
Tendency to bluff or "know it all"						
Tendency to complain						
TOTAL						

PLEASE FEEL FREE TO WRITE COMMENTS BELOW:

Evaluated by ______________________________

Position ______________________________

ORIENTATION
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to write a resume and letter of application, complete an application form, and interview for employment in agribusiness. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to employment in agribusiness with their correct definitions.
2. Circle the words which best complete statements concerning the importance of agribusiness and production agriculture to the economy.
3. Match broad occupational areas of agriculture/agribusiness with their correct subareas.
4. Select means of locating employment.
5. List factors to consider when choosing an occupation.
6. Arrange in order the steps to take in being employed.
7. Arrange in order the steps in making a good decision.
8. Select personal attributes or attitudes an employer looks for during a personal interview.
9. Select true statements concerning preparing for an interview.
10. List positive ways to begin an interview.

OBJECTIVE SHEET

11. Circle the words which best complete statements concerning special considerations for answering questions clearly.
12. Select ways to maintain an interviewer's interest.
13. Compile a list of employment opportunities in agribusiness in your community.
14. Apply steps in making a decision.
15. Write a resume.
16. Write a letter of application for employment in agribusiness.
17. Complete an employment application form for a position in agribusiness.
18. Practice interview questions.
19. Make an appointment by phone for an agribusiness employment interview.
20. Write a follow-up letter or make a follow-up phone call after interviewing for an agribusiness position.
21. Evaluate an agribusiness employment offer.
22. Compare employment opportunities.

ORIENTATION
UNIT I

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Have students prepare a self-inventory listing their education, experience, personal information, and school activities for use in choosing an occupation.

VII. Have students complete a plan for reaching their occupational objectives including the education and experience needed to qualify for the position.

VIII. Obtain want ads from newspapers in your area and discuss agribusiness opportunities in your area.

IX. Prepare a bulletin board on agribusiness employment opportunities.

X. Contact an agribusiness representative to speak to the class on employment opportunities.

XI. Provide students with wage and salary figures for agribusiness positions in your area.

XII. Obtain videotape equipment to record students in practice interviews. Play back tapes and discuss positive and negative points with students.

XIII. Request a teletrainer from the local phone company for students to use in completing Assignment Sheets #7 and #8.

XIV. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

INSTRUCTIONAL MATERIALS

C. Transparency masters

1. TM 1 — Attitudes
2. TM 2 — Appropriate Dress
3. TM 3 — Take the Time to be on Time

D. Assignment sheets

1. Assignment Sheet #1 — Compile a List of Employment Opportunities in Agribusiness in Your Community
2. Assignment Sheet #2 — Apply Steps in Making a Decision
3. Assignment Sheet #3 — Write a Resumé
4. Assignment Sheet #4 — Write a Letter of Application for Employment in Agribusiness
5. Assignment Sheet #5 — Complete an Employment Application Form for a Position in Agribusiness
6. Assignment Sheet #6 — Practice Interview Questions
7. Assignment Sheet #7 — Make an Appointment by Phone for an Agribusiness Employment Interview
8. Assignment Sheet #8 — Write a Follow-Up Letter or Make a Follow-Up Phone Call After Interviewing for an Agribusiness Position
9. Assignment Sheet #9 — Evaluate an Agribusiness Employment Offer
10. Assignment Sheet #10 — Compare Employment Opportunities

E. Test

F. Answers to test

II. References:

A. Carlile, Robert. *Agriculture Sales and Service.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

B. *Agriculture 2000 — A Look at the Future.* A study by Columbus Division Battelle Memorial Institute, sponsored by the Production Credit Associations. Columbus: Battelle Press, 1983.

C. Jennings, Margie S. *Decisions in Living.* Lexington, MA: Ginn and Company (Xerox Corp.), 1976.

INSTRUCTIONAL MATERIALS

III. Additional materials:

(NOTE: The following materials would be beneficial as supplementary teaching aids and may be obtained by writing to the address listed below.)

A. *Multimedia Materials for Occupational, Vocational, and Career Education.* A catalog of teaching aids such as computer programs, film strips, cassettes, teacher guides, and workbooks which are available from Career Aids, Inc., 8950 Lurline Avenue, Department TE, Chatsworth, CA 91311.

Examples:
1. Choosing Careers
2. Job Readiness
3. Introducing the Working World
4. Finding and Keeping a Job
5. Job Interview Kit

B. Wolf, Willard H. *Opportunities in Agricultural Occupations.* Columbus, OH: Ohio Agricultural Education Curriculum Materials Service, 1976.

ORIENTATION
UNIT I

INFORMATION SHEET

I. **Terms and definitions**

  A. Agribusiness — Firm or economic enterprise organized to produce and sell services and supplies to farmers for use in farm production and farm living

  B. Agriculture production — Science or art of cultivating the soil, producing crops, raising livestock, and all other aspects of preparing these products to move from producer to consumer

  C. Application form — Printed form on which job applicants record information about their personal history, job history, job experience, education, and references

  D. Award — Recognition received for outstanding achievement

  E. Decision making — Reaching a conclusion about something after considering a set of facts, reasons, and alternatives

  F. Employment office — Business that is designed to help individuals find employment

  G. Equal opportunity employer — Employer who is making a special effort to assure that no form of discrimination is practiced

  Examples: Age, sex, race, creed

  H. Extracurricular activities — Clubs, organizations, and social or church groups in which one participates

  Examples: Student Council, Honor Society

  I. Fringe benefits — Extras provided by an employer, such as paid vacations, sick leave, and insurance protection

  J. Help wanted ad — Classified advertisement telling what position is available and what the qualifications are

  K. Interview — Meeting of employer and job applicant for purpose of evaluation and questioning

  L. Job description (position description) — Written statement outlining responsibilities of an individual within a business or industry

INFORMATION SHEET

M. Legible — Capable of being read; clear

N. Qualifications — Experience, education, and physical characteristics which suit a person to a job

O. Resumé — Brief, typed summary of one's qualifications, experience, and personal background that is used in applying for a job

P. Values — Personal principles which influence an individual's actions

Q. Vocational preparation — Any vocational courses and skills one has learned in school or through job experience

R. Wage — Payment of money for labor or services, usually on an hourly basis

(NOTE: Another term for wage is salary which is generally paid on a monthly basis.)

II. Importance of agribusiness and production agriculture to the economy

A. Approximately 23 percent of all workers owe their employment directly to production agriculture and agricultural businesses

B. Approximately 2.5 million people operate commercial farms

C. For each operating farmer there are approximately seven other people working in agri-related occupations

D. Approximately 13 billion dollars are spent each year for production, supplies, and service

E. Owners and managers of agricultural businesses prefer to hire people with an agricultural background or training in agriculture

III. Broad occupational areas of agriculture/agribusiness and their subareas

A. Agricultural production

1. Animal science
2. Plant science
3. Related subjects

B. Agribusiness

1. Accounting

INFORMATION SHEET

2. Buying and marketing
3. Financial and legal management
4. Farm organizations
5. Government programs
6. Agricultural consultant
7. Other agribusiness management

C. Agricultural sales and services

1. Agricultural chemicals
2. Livestock feeds
3. Seeds
4. Fertilizers
5. Other agricultural supplies

D. Agricultural mechanics

1. Agricultural power and machinery
2. Agricultural structures and conveniences
3. Soil and water management
4. Agricultural mechanics skills

   Examples: Welding, plumbing
5. Agricultural construction and maintenance
6. Agricultural electrification
7. Other agricultural mechanics

E. Agricultural products

1. Food products
2. Non food products

INFORMATION SHEET

F. Ornamental horticulture

  1. Arboriculture
  2. Floriculture
  3. Greenhouse operation and management
  4. Landscaping
  5. Nursery operation and management
  6. Turf management
  7. Other ornamental horticulture

G. Agricultural resources

  1. Soil
  2. Wildlife (including game farms and hunting areas)
  3. Water
  4. Air
  5. Fish (including farms and hatcheries)
  6. Other agricultural resources

H. Forestry

  1. Forests
  2. Forest protection
  3. Logging (harvesting and transporting)
  4. Wood utilization
  5. Recreation
  6. Special projects
  7. Other forestry

INFORMATION SHEET

IV. **Means of locating employment**

- A. Classified ads
    - 1. Newspapers
    - 2. Magazines
- B. Employment offices
    - 1. State and federal labor offices
    - 2. Private

      (NOTE: A fee is charged by most private agencies.)
- C. Letter of inquiry
- D. School officials
    - 1. Teacher
    - 2. Counselor
    - 3. Principal
    - 4. Placement officer
- E. Current workers in agribusiness
- F. Friends and neighbors
- G. Former employers
- H. Radio and television

V. **Factors to consider when choosing an occupation**

- A. Interests and hobbies
- B. Salary
- C. Advancement opportunities
- D. Security for the future
- E. Working conditions

INFORMATION SHEET

F. Interpersonal relationships with co-workers and employer

G. Location

VI. **Steps to take in being employed**

A. Choose your field

B. Locate employment opportunities

C. Prepare a personal resumé

D. Write a letter of application if appropriate

E. Fill out an application

F. Arrange for an interview

G. Interview

H. Follow up the interview

(NOTE: Write a thank you letter, call, or visit again to express interest in the position and appreciation for the opportunity to interview.)

VII. **Steps in making a good decision (Assignment Sheet #2)**

A. Identify the problem

B. Get the facts

C. Weigh the facts and evaluate them

D. Consider the alternatives

E. Relate the problem to your own values

F. Make the decision

G. Act

H. Follow-up, evaluate, and revise as necessary

(NOTE: An important factor to remember in decision making is there is never only one decision.)

I. Accept the consequences

INFORMATION SHEET

VIII. **Personal attributes or attitudes an employer looks for during a personal interview (Transparency 1)**

(NOTE: A good first impression makes a lasting impression.)

A. Enthusiasm and interest

(NOTE: This includes taking pride in your work and being willing to do more than your share when needed.)

B. Dedication and dependability

(NOTE: This involves good work habits which include regular attendance and being on time; it also means you should readily follow directions.)

C. Alertness, quickness of mind

(NOTE: You should always look for unsafe situations that could injure workers or damage property, and you should constantly look for more efficient working practices.)

D. Honesty and integrity

E. Desire to work

F. Ability to work well with others

G. Desire to improve skills

(NOTE: Good employees always look for ways to increase their knowledge; this benefits both the employer and employee.)

IX. **Preparing for an interview**

A. Wear appropriate clothing and shoes (Transparency 2)

(NOTE: Dress better for the interview than you would for a day on the job. This includes well coordinated clothing; avoid wearing sneakers, sandals, or hats.)

B. Be well-groomed and neat

C. Take a black ink pen, several copies of your resumé, and all information concerning social security number, references, names and addresses, dates employed, and dates you attended school

(NOTE: An extra pen is recommended.)

INFORMATION SHEET

D. Go alone; do not take parents or friends

E. Do not be late (Transparency 3)

(NOTE: Allow adequate time to complete a job application form. If an application has already been completed, arriving five to ten minutes before an interview is recommended.)

F. Find out facts about the interviewer ahead of time

(NOTE: Obtain this information from the receptionist or before arriving for the interview.)

1. Name of interviewer

   (NOTE: Make sure you have the correct pronunciation.)

2. Title of interviewer

G. Know facts about the business

1. Name of business
2. Kind of business
3. Products and services
4. How old the company is and where the plants, offices, or stores are located

   (NOTE: This information may be hard to obtain, but be observant in the waiting room; ask receptionist for brochure on company. Libraries and the yellow pages in the phone book are other sources of information.)

X. Positive ways to begin an interview

A. Smile and establish eye contact

B. Listen carefully

C. Enter with poise

D. Greet the interviewer by name

E. Shake hands firmly

INFORMATION SHEET

F. Introduce yourself

G. State purpose of call

H. Be seated only at interviewer's invitation

I. Do not show signs of nervousness

(NOTE: If you do not know where to put your hands, leave them on your lap and keep them still.)

J. Do not place personal things on interviewer's desk

K. Do not smoke or chew gum

L. Look alert, interested, and enthusiastic

(NOTE: Words such as Mr., Mrs., Miss, Ms., thank you, please, and Sir never go out of style.)

XI. Special considerations for answering questions clearly

A. Do not interrupt

B. Anticipate questions that might be asked and volunteer proper information

C. Explain yes and no answers

D. Avoid criticizing former employers or competitors

E. Do not talk about personal problems

F. Answer all questions honestly

Examples: "The thing I liked least about my last position was that I was on the night shift and couldn't get changed. I really wanted to be home with my family at night."

"Truthfully, my relationship with my supervisor could have been better. We seemed to have a personality conflict and never became fond of each other. However, we did manage to work together. This was my first experience like that and I surely hope it doesn't happen again."

INFORMATION SHEET

G. Give positive answers to unfavorable questions

Example: Interviewer: "Your work experience doesn't seem to relate specifically to this job. Why do you feel qualified to fill this position?

Applicant: "I do understand your concern. However, my job experience is broad enough to permit me to work into this particular situation. I have done work similar to this job and I think my general work record is good enough to convince you that I would be a good employee. I would be willing to receive additional training."

H. Find a true, positive statement about your reasons for leaving previous jobs, even if you were fired

Examples: "I was laid off, but I learned from my mistakes."

"I left because they did not need as many employees during the slow season."

I. Try to mention your best qualities in relation to something concrete

Example: "I earned 75 percent of my expenses while going to school" is better than "I am a hard worker and want to get ahead."

J. Be prepared for personal questions about your home life and parents' occupations

(NOTE: These questions are inappropriate but are sometimes asked by the interviewer.)

K. Avoid questions concerning politics, economics, religion, and other controversial subjects

L. Answer questions about career objectives using specific terms about what you would like to do in the near future in that particular field without limiting your opportunities

Example: "I would like to work as a dock hand and go to school part time; my ultimate goal is to get into management."

INFORMATION SHEET

XII. Ways to maintain an interviewer's interest

A. Look directly at interviewer

B. Speak in clear, moderate tones

C. Use correct English

(NOTE: Avoid swearing, slang terms, or annoying phrases like "yeah," "you know" or "uhhuh.")

D. Show interest in the business; ask questions

Example: "I wonder if you could give me some information about the products which are produced by the company."

E. Sell yourself

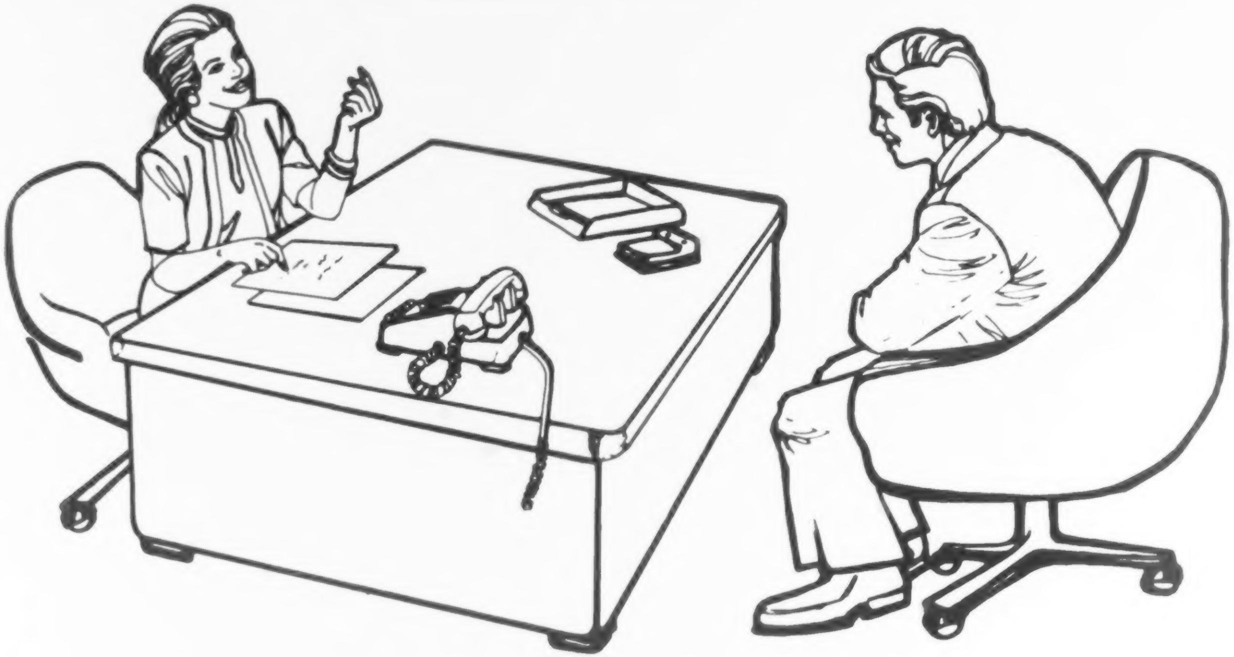
(NOTE: Never refer to yourself as just average or fair. Always look for a positive response.)

F. Give the interviewer the opportunity to mention salary and fringe benefits

G. Act enthusiastically

Attitudes

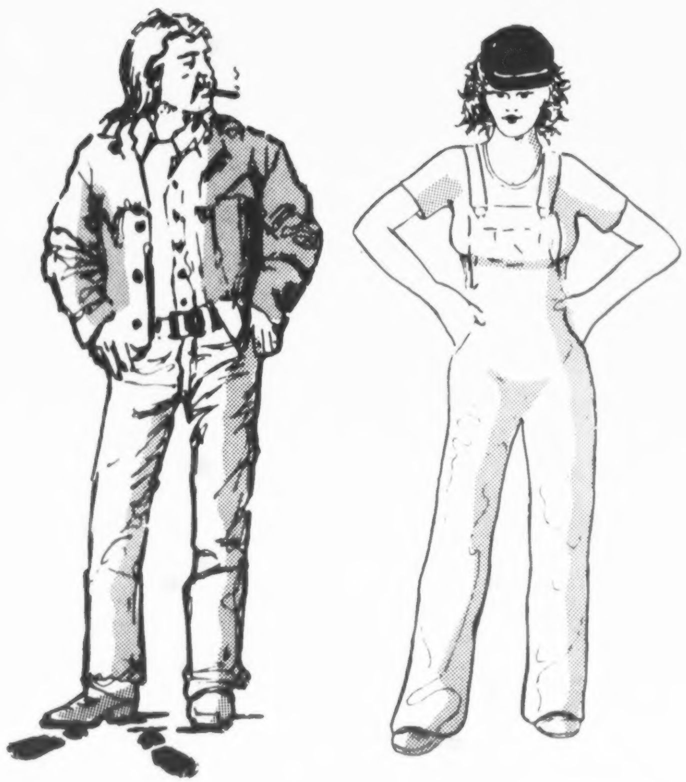
Enthusiasm, Interest, Dedication, Dependability, Alertness, Quickness of Mind, Honesty, Integrity, Desire to Work, Ability to Work with Others, Desire to Improve One's Self



Appropriate Dress

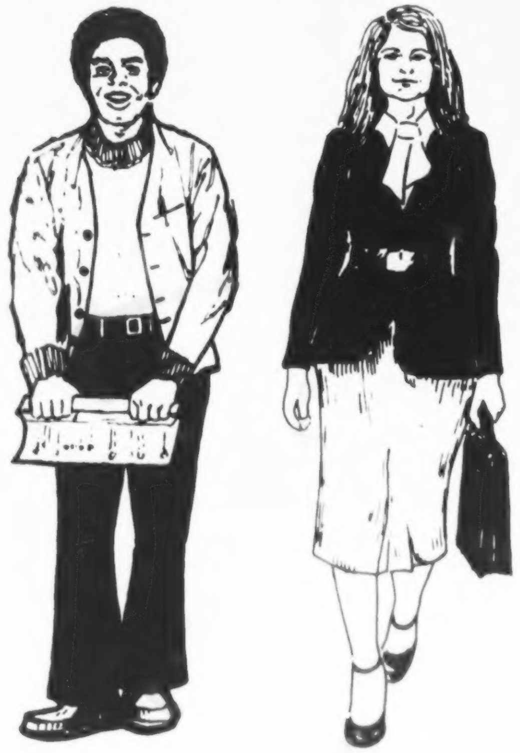
Hair Neatly Trimmed and Combed ?

Shoes in Good Repair ?

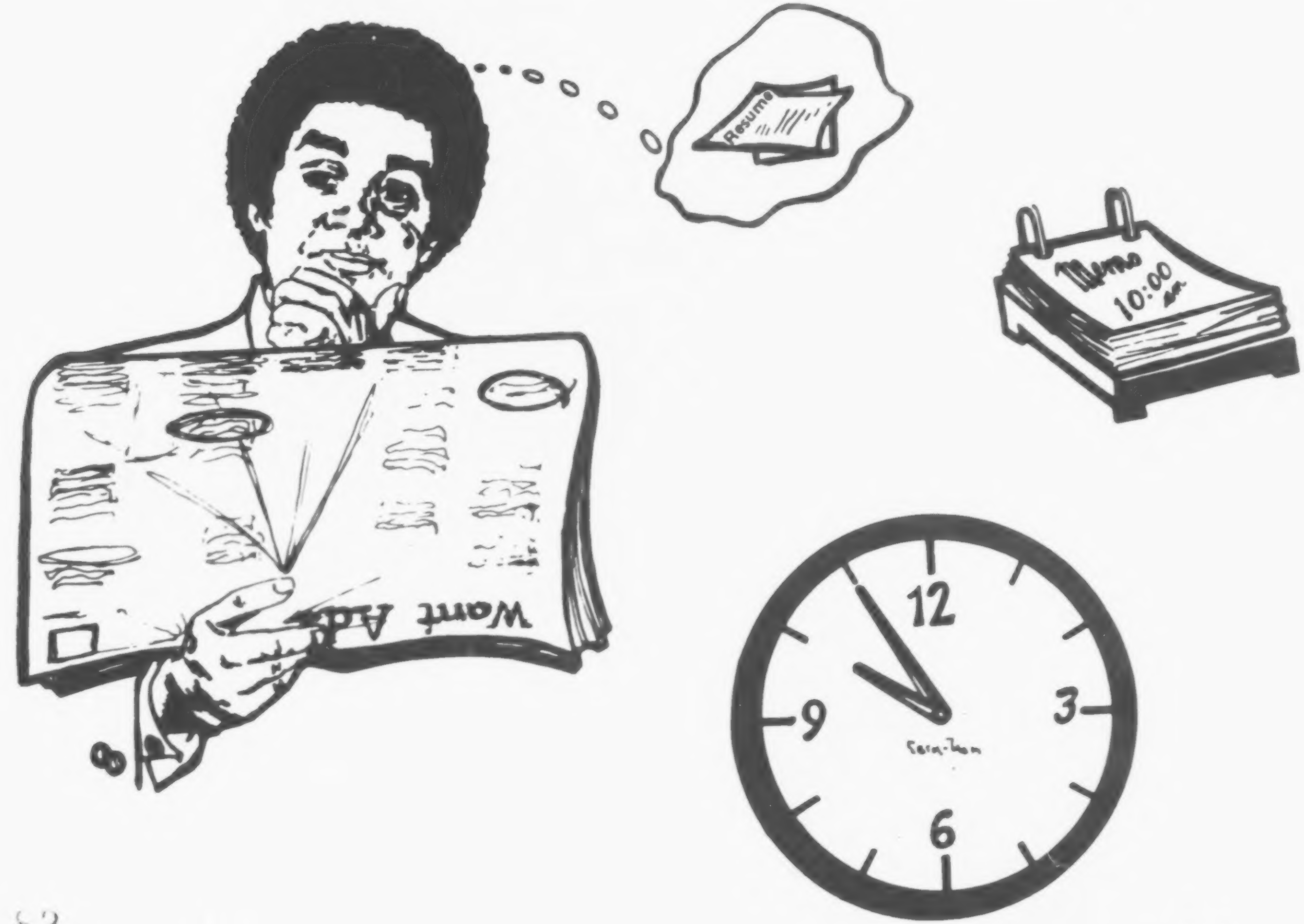


Conservative and Coordinated Clothing ?

Well-Groomed ?



Take the Time to be on Time


Resume
Want Ads
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9
3
6

ORIENTATION
UNIT I

ASSIGNMENT SHEET #1 — COMPILE A LIST OF EMPLOYMENT OPPORTUNITIES IN AGRIBUSINESS IN YOUR COMMUNITY

Directions: Make a list of agricultural businesses in your community, their occupations, and the products and services that are offered.

	AGRICULTURAL BUSINESS	OCCUPATIONS	PRODUCTS AND SERVICES
1.	____________ ____________	____________ ____________ ____________	____________ ____________ ____________
2.	____________ ____________	____________ ____________ ____________	____________ ____________ ____________
3.	____________ ____________	____________ ____________ ____________	____________ ____________ ____________
4.	____________ ____________	____________ ____________ ____________	____________ ____________ ____________
5.	____________ ____________	____________ ____________ ____________	____________ ____________ ____________
6.	____________ ____________	____________ ____________ ____________	____________ ____________ ____________

ASSIGNMENT SHEET #1

	AGRICULTURAL BUSINESS	OCCUPATIONS	PRODUCTS AND SERVICES
7.	____________	____________	____________
	____________	____________	____________
		____________	____________
8.	____________	____________	____________
	____________	____________	____________
		____________	____________
9.	____________	____________	____________
	____________	____________	____________
		____________	____________
10.	____________	____________	____________
	____________	____________	____________
		____________	____________

ORIENTATION
UNIT I

ASSIGNMENT SHEET #2 — APPLY STEPS IN MAKING A DECISION

Directions: Think of a decision you made recently and determine what influenced your decision. Answer the following questions about your decision.

1. Identify the problem.

2. What was your decision?

3. What facts and/or resources were used to make your decision?

4. Was your decision based on past experiences, luck, a previous decision, habit, a snap judgement, or emotions?

ASSIGNMENT SHEET #2

5. Did your values play a part in the decision making process?

____
____
____
____

6. What other choices did you have?

____
____
____
____

7. Were you able to accept the consequences of your decision?

____
____
____
____

ORIENTATION
UNIT I

ASSIGNMENT SHEET #3 — WRITE A RESUMÉ

Directions: Write a resumé using accurate facts about yourself. Use the information below and the sample resumé included in this assignment sheet as guides. A good resumé should immediately give prospective employers a brief summary of your accomplishments, educational background, work experience (paid, unpaid employment) skills, and job objective. It is not necessary to use the exact wording and outline form used on the sample resumé, but it is necessary that your resumé be neat and balanced and contain all the information which might help you get a job. Keep a current copy of the resumé and use it to apply for jobs.

1. Inspect several resumé formats and choose one that best fits your needs or use the example included in this assignment sheet as a guide
2. Type your resumé on 8 1/2"× 11" white paper; try to limit the number of pages
3. Keep resumé error free

   (NOTE: Many employers will not consider persons who have resumés that include misspelled words and typographical errors.)
4. Use outline form
5. Put your name prominently at the top in the upper left-hand corner; beneath name, give full street address, city, state, zip code, telephone number with area code, and a number where messages can be accepted

   (NOTE: Do not print a photo on the resumé. If a photo is requested, attach it to the resumé.)
6. Under Personal Data include birthdate, height, weight, health, and marital status; do not include religious and political affiliations

   (NOTE: The above information is optional.)
7. Describe your job objective or career goal briefly
8. Describe your educational background, giving names of schools, dates of enrollment, and diploma or degrees received
9. List related subjects studied; include grade averages, if favorable
10. List student activities and awards
11. List hobbies and extracurricular activities if they are relevant

ASSIGNMENT SHEET #3

12. List your past employment, starting with your most recent job; include name of firm, mailing address, job title, starting and ending dates of employment, name of immediate supervisor, and phone number

    (NOTE: Always maintain chronological order on events.)

13. List duties of your last job

    (NOTE: Concentrate on skills you have used; let employer know what you can do. Remember, you have to prove your value to the business, especially if you have little experience.)

14. List three people as character references; include their complete mailing addresses and phone numbers

    (NOTE: Ask permission before you use anyone as a reference.)

15. List one or more work references; include people that you have actually worked for

    (NOTE: Avoid listing relatives as a reference unless you have actually worked for them on a salary basis.)

16. Write "Confidential" at the top of the resumé if you don't want your current employer to know you are looking for other employment

17. Proofread your resumé carefully and retype if necessary; reproduce several copies on white bond paper

    (NOTE: Your resumé's physical appearance is VERY IMPORTANT. Avoid using ditto or carbon copies. Be sure to proofread the printer's work. Always bring extra copies to the interview. Leave one copy of the resumé with interviewer and use one as a reference when filling out the application form. You should also mail one resumé with your letter of application.)

ASSIGNMENT SHEET #3

SAMPLE RESUMÉ

TERRY McKRACKEN

ADDRESS:

Present:	774 E. Adams Street YourTown, YourState 77704 (405)555-7779	Permanent:	Route #3 AnyTown, YourState 77704 (405)555-4433

PERSONAL DATA:

Age: 18	Health: Excellent
Birthdate: Jan. 21, 1966	Marital Status: Single
Height: 5′ 7″	
Weight: 160 lbs.	

JOB OBJECTIVE

Assistant Manager

ULTIMATE GOAL:

Feed Store Manager

EDUCATION:

AnyTown High School, AnyTown, YourState 1979-83
Grade Average: 3.5 on a 4.0 scale

RELATED SUBJECTS STUDIED:

High School

Typing — 1 semester
Advanced Livestock Production — 1 semester
Ag 1 — 2 semesters
Ag 2 — 2 semesters
Agribusiness — 1 semester

STUDENT ACTIVITIES:

President, Senior Class
President, FFA
Treasurer, Baptist Youth Fellowship Organization
Livestock Judging Team, Fifth Place (State), Third High Individual (State)

ASSIGNMENT SHEET #3

WORK EXPERIENCE:

Name: Bate's Feed Store
612 W. Oak
YourTown, YourState 77704
(405)555-7212

Job Title: Dock hand
Dates: June 1, 1982 to Present

Supervisor: Mr. Bill Bates

Duties: Filling customer orders
Loading and unloading deliveries
Checking stock

Name: John Farmer
R.R. #2
YourTown, YourState 77704
(405)555-2000

Job Title: Farm worker
Dates: Jan. 1, 1981 to May 15, 1982

Supervisor: Mr. John Farmer

Duties: Feeding livestock
Machinery operation
Hay hauling

CHARACTER REFERENCES:

1. Mr. Sammy Davis (918)555-2442
   Vocational Agriculture Instructor
   AnyTown High School
   AnyTown, YourState 77703

2. Mr. John Hammer (918)555-3333
   Friend and Neighbor
   772 E. Adams Street
   YourTown, YourState 77703

3. Mrs. Jerri Smith (918)555-1000
   Youth Director, Parkview Baptist Church
   711 Fellowship Circle
   AnyTown, YourState 77702

WORK REFERENCE: (with permission)

Mr. Bill Bates (405)555-7212
Owner/Manager
Bate's Feed Store
612 W. Oak
YourTown, YourState 77704

ORIENTATION
UNIT I

ASSIGNMENT SHEET #4 — WRITE A LETTER OF APPLICATION FOR EMPLOYMENT IN AGRIBUSINESS

The application letter is a sales technique to tell the employer how your abilities will be useful to the business. The letter should specify your qualifications while the resumé gives general background information.

Directions: Cut a help wanted ad for an agribusiness job from the classified ad section of the local paper. Write an application letter to accompany the resumé you prepared in Assignment Sheet #3. Use the following information and the sample letter as a guide.

(NOTE: If you cannot type, it is recommended that you locate someone to type your letters for you. Make sure you have a good typewriter available.)

1. Use acceptable form and appearance
    a. Type neatly and accurately
    b. Use on only one side of the paper
    c. Avoid smudges and typographical errors
    d. Use 8 1/2" × 11" white bond paper

       (NOTE: Do not use personal or fancy paper.)
    e. Spell, capitalize, and punctuate correctly
    f. Include employer's full name, title, and address
    g. Include your full name and address with zip code on the letter
    h. Retain a copy for further reference
2. Include proper information
    a. Write to a specific person

       (NOTE: Find out the name of the personnel manager or employer you want to reach and the correct title. When in doubt, write to the top person who will refer your resumé to the right party. Use TO WHOM IT MAY CONCERN if answering a blind ad.)
    b. Avoid excessive use of the pronoun "I"

ASSIGNMENT SHEET #4

c. Be brief; do not repeat information in the resumé
    1) State the position for which you are applying
    2) Avoid needless details
    3) Cover all points requested in the advertisement in exactly the order in which they were asked

    (NOTE: Some prospective employers make it a point of testing the applicant's ability to follow directions.)

d. State reason for interest in job

(NOTE: Employers look for people who look for future advancement opportunities rather than just a paycheck.)

e. Refer briefly to the main points in the attached resumé

f. Mention that persons listed on the resumé have given their permission to serve as references

g. Request interview at employer's convenience
    1) Tell where you can be reached
    2) Enclose self-addressed envelope and resumé
    3) Say you will phone next week

3. Be original in your approach — Attract attention in opening paragraph

Examples: Dear Mr. Money:

My experience as a farm worker would be of interest to you.

Dear Ms. Owner:

Mr. Co-worker informed me that you are in need of a person to train as an assistant manager. I believe that my education and experience have taught me how to handle these duties efficiently and accurately.

4. End the letter promptly

(NOTE: "Sincerely" or "Professionally" is appropriate.)

5. Use permanent address for the return address and make sure to include the current date

ASSIGNMENT SHEET #4

6. Staple letter to resumé since it may be circulated to several departments and otherwise become detached

7. Follow up and phone for an appointment a week later

   (NOTE: Don't be surprised if the resumé has been referred to another department. Remember, they are in business and you may not get immediate attention, especially if you sent a blind letter. Be persistent until you reach the right person and ask for a convenient date to set up an interview.)

8. Keep in touch regarding possible openings now and in the future

   (NOTE: The "job hunt" may take several weeks or even months. It is important to keep your contacts alive without being a nuisance.)

ASSIGNMENT SHEET #4

SAMPLE LETTER OF APPLICATION

Route #3
AnyTown, YourState 77702
July 1, 1983

Mr. John Jones
Owner
Jones' Feed and Seed
YourTown, YourState 77704

Dear Mr. Jones:

Please consider me for the position of assistant manager which you advertised in the *Daily Chronicle.*

The skills I have learned in my agriculture courses and my prior work experience should qualify me for this job. A more complete description of my qualifications is given in the enclosed resumé.

I would appreciate the opportunity to come and talk over this position with you at your convenience and can be reached by telephone at 405-555-4433 after 3:30 or at the above address.

Sincerely,

Terry McKracken

Terry McKracken
Encl.

ORIENTATION
UNIT I

ASSIGNMENT SHEET #5 — COMPLETE AN EMPLOYMENT APPLICATION FORM FOR A POSITION IN AGRIBUSINESS

Directions: Complete the following application form using the guidelines below. Use information corresponding to the classified ad and to your letter of application. Use information about yourself from your resume.

(NOTE: Although each business uses its own form, general rules of preparation apply to any form.)

1. Be prepared
   a. Take two good ink pens with you (dark ink)
   b. Take copies of resume
2. Look over entire form before starting to write; do not hurry
3. Follow directions
   a. Note whether information is to be printed or handwritten
   b. Complete all directions
4. Write or print clearly, neatly, and legibly
5. Answer briefly
6. Be honest
7. Answer all questions

   (NOTE:If questions do not apply to you, write "Not Applicable" or "NA" in the space to show that you did not overlook the question.)
8. Include complete information; use resume
9. Recheck application when finished
10. Avoid cross-outs and obvious erasure marks

    (NOTE: Request a second copy if cross-outs and erasure marks cannot be avoided.)
11. Do not list any restrictions to the geographical area in which you would work unless you absolutely will not consider other geographical areas

ASSIGNMENT SHEET #5

"WE ARE AN EQUAL OPPORTUNITY EMPLOYMENT COMPANY. WE ARE DEDICATED TO A POLICY OF NON-DISCRIMINATION IN EMPLOYMENT ON ANY BASIS INCLUDING RACE, CREED, COLOR, AGE, SEX, RELIGION OR NATIONAL ORIGIN OR PHYSICAL DEFECTS."

APPLICATION FOR EMPLOYMENT

PERSONAL INFORMATION

DATE ____________

NAME ____________ LAST ____________ FIRST ____________ MIDDLE ____________

PRESENT ADDRESS ____________ STREET ____________ CITY ____________ STATE ____________ ZIP ____________

PERMANENT ADDRESS ____________ STREET ____________ CITY ____________ STATE ____________ ZIP ____________

PHONE NO ____________ SOCIAL SECURITY NUMBER ____________

____________ REFERRED BY ____________

EMPLOYMENT DESIRED

POSITION ____________ DATE YOU CAN START ____________ SALARY DESIRED ____________

ARE YOU EMPLOYED NOW? ____________ IF SO MAY WE INQUIRE OF YOUR PRESENT EMPLOYER ____________

EVER APPLIED TO THIS COMPANY BEFORE? ____________ WHERE ____________ WHEN ____________

EDUCATION	NAME AND LOCATION OF SCHOOL	YEARS ATTENDED	DATE GRADUATED	SUBJECTS STUDIED
GRAMMAR SCHOOL				
HIGH SCHOOL				
COLLEGE				
TRADE, BUSINESS, OR CORRESPONDENCE SCHOOL				

SUBJECTS OF SPECIAL STUDY OR RESEARCH WORK ____________

U.S. MILITARY OR NAVAL SERVICE ____________ RANK ____________ PRESENT MEMBERSHIP IN NATIONAL GUARD OR RESERVES ____________

ACTIVITIES OTHER THAN RELIGIOUS (CIVIC, ATHLETIC, FRATERNAL, ETC.) ____________

Exclude organizations, the name or character of which indicates the race, creed, color, or national origin of its members.

(CONTINUED ON OTHER SIDE)

EA-39-A

ASSIGNMENT SHEET #5

FORMER EMPLOYERS (LIST BELOW LAST FOUR EMPLOYERS, STARTING WITH LAST ONE FIRST)

DATE MONTH & YEAR	NAME AND ADDRESS OF EMPLOYER	SALARY	POSITION	REASON FOR LEAVING
FROM				
TO				
FROM				
TO				
FROM				
TO				
FROM				
TO				

REFERENCES: Give below the names of two persons not related to you, whom you have known at least one year

NAME	ADDRESS	BUSINESS	YEARS ACQUAINTED
1			
2			

PHYSICAL RECORD:
List any physical defects

WERE YOU EVER INJURED? GIVE DETAILS

HAVE YOU ANY DEFECTS IN HEARING? IN VISION? IN SPEECH?

IN CASE OF
EMERGENCY NOTIFY
NAME ADDRESS PHONE NO

I AUTHORIZE INVESTIGATION OF ALL STATEMENTS CONTAINED IN THIS APPLICATION. I UNDERSTAND THAT MISREPRESENTATION OR OMISSION OF FACTS CALLED FOR IS CAUSE FOR DISMISSAL. FURTHER, I UNDERSTAND AND AGREE THAT MY EMPLOYMENT IS FOR NO DEFINITE PERIOD AND MAY, REGARDLESS OF THE DATE OF PAYMENT OF MY WAGES AND SALARY, BE TERMINATED AT ANY TIME WITHOUT ANY PREVIOUS NOTICE

DATE SIGNATURE

DO NOT WRITE BELOW THIS LINE

TO BE COMPLETED DAY EMPLOYMENT BEGINS DATE

HEIGHT WEIGHT AGE DATE OF BIRTH

SINGLE MARRIED WIDOWED CITIZEN U.S.A. SEX

THE ABOVE INFORMATION NEEDED FOR PENSION, HOSPITALIZATION, INSURANCE, ETC., AND NOT FOR HIRING PURPOSES

INTERVIEWED BY DATE REMARKS

NEATNESS		CHARACTER	
PERSONALITY		ABILITY	

HIRED FOR DEPT. POSITION WILL REPORT SALARY WAGES

APPROVED: 1. 2. 3.
EMPLOYMENT MANAGER DEPT. HEAD GENERAL MANAGER

ASSIGNMENT SHEET #5

12. Use the word "open" for questions about minimum salary since most employers pay standardized rates and will not negotiate on this

13. Make copy of application, if possible

ORIENTATION
UNIT I

ASSIGNMENT SHEET #6 — PRACTICE INTERVIEW QUESTIONS

Directions: Answer the following questions which might be asked when applying for various jobs. Keep this assignment sheet to review before going on any actual interview.

(NOTE: Questions about your personal life may not legally be asked. In fact, it is illegal for an employer to ask your maiden name or your father's surname if you are a female applicant; your marital status; who lives with you; the church you attend or the name of your spiritual leader; how many children you have, their ages, or who will care for them while you are at work; whether you own or rent your residence; whether you have ever had your wages garnished; and whether you have ever been arrested. However, many interviewers, particularly in smaller businesses, may ask such questions. Whether or not you choose to answer the questions depends on you.)

How would you answer the following questions? Why do you think each question might be asked?

1. Where do you go to school? When will you graduate?
2. Do you (did you) earn any of your own expense money while in school?
3. Why did you leave your previous job?
4. What did you like best and what did you like least about your classes?

   (NOTE: This could be asked about teachers, jobs, or employers.)
5. What books have you read lately? What are your favorite magazines?
6. Are you in good health?
7. What do you expect to be doing five or ten years from now? What is your chosen field of work?
8. At what salary do you expect to start?
9. What are some of your special abilities? What skills do you possess? What tools or equipment can you operate?
10. How would you rate your training for this job? Excellent? Very good? Fair?
11. What personal characteristics do you think are needed to succeed in your vocation?
12. In what area do you need the most improvement?

ASSIGNMENT SHEET #6

13. Do you like to work with other people or do you work best alone?

14. Do you have any questions you want to ask us?

15. Do you think your extracurricular activities were worth the time you devoted to them?

16. How could you contribute to our organization? Why should we hire you?

17. Tell us about your family and any plans for marriage or further education.

    (NOTE: Legally, you do not have to answer this question. However, it is a good idea to prepare an answer in case such a question is asked.)

    Example: "My family includes a younger sister and my parents, with whom I live. My plans for marriage are undecided at this time, and I'm hoping that the experience gained by being an employee of your company will help me to decide about furthering my education.

18. For what other jobs have you applied?

19. Do you have any military obligations to fulfill?

20. May we write or call your last employer?

21. How many people have you supervised at work or through organizations of which you are a member?

22. How do you feel about working overtime?

23. Would you be able to work all day Saturday and Sunday?

24. If you could start school (or work) over again what would you do differently?

25. What is your school (work) attendance record?

26. Have you done the best school work of which you are capable?

27. Do you require attention? Does criticism disturb you?

    (NOTE: These questions are usually asked in a more subtle and indirect way.)

28. What motivates you?

29. Would you be willing to relocate?

30. Define *cooperation*.

    (NOTE: YOU NEVER GET A SECOND CHANCE TO MAKE A GOOD FIRST IMPRESSION!!! GETTING A JOB IS A JOB!!!)

ORIENTATION
UNIT I

ASSIGNMENT SHEET #7 — MAKE AN APPOINTMENT BY PHONE FOR AN AGRIBUSINESS EMPLOYMENT INTERVIEW

Making an appointment by phone does two things. First, it shows that you are interested in saving the employer's time. Second, it shows that you are thoughtful for asking what would be the best time for you to see the employer.

1. Steps in making an appointment by phone
   a. Plan what you are going to say before you call
   b. State you name and reason for calling

      Example: "Hello, this is Terry McKracken. I'm calling about your ad in last night's paper for an assistant manager. May I have an appointment for an interview?"

   c. Ask when would be the best time for you to come for the interview
   d. Record the day, time, and place of the interview
   e. Thank the receptionist for the help
2. Things to remember when calling for an appointment
   a. Keep the receptionist on your side; the receptionist is there to help you

      (NOTE: The receptionist is sometimes asked to evaluate the applicant.)

   b. Do not ask over the phone how much the job pays

      (NOTE: Some questions about the nature of the job may be appropriate.)

   c. Be polite and courteous

      (NOTE: Remember that this call is the first contact you may have with the firm. Make that first impression a good one.)

   d. Ask if you should pick up an application blank or if they would like to send it to you before the interview

ASSIGNMENT SHEET #7

Directions: Now that you have read about the correct way to arrange for an employment interview, role play a situation where you make an appointment by phone. Use the checklist below to evaluate your performance.

	YES	NO	IF, NO, EXPLAIN
Was prepared before calling			
Comments:			
Did not have to stammer to find the right words			
Comments:			
Identified self immediately			
Comments:			
Stated reasons for calling immediately			
Comments:			
Asked the best time for an appointment with employer			
Comments:			
Was courteous and friendly			
Comments:			
Asked about picking up application blank or having application blank sent prior to interview			
Comments:			
Thanked the receptionist			
Comments:			
Made record of the interview date, hour, and place			
Comments:			

ORIENTATION
UNIT I

ASSIGNMENT SHEET #8 — WRITE A FOLLOW-UP LETTER OR MAKE A FOLLOW-UP PHONE CALL AFTER INTERVIEWING FOR AN AGRIBUSINESS POSITION

It is sometimes helpful to return to a business and check again on possible job openings. This is often done about a week after the first interview. This short casual visit accomplishes two things. It helps the interviewer remember you, and it shows that you have a sincere interest in working for that company.

However, it is not always possible to have this type of informal atmosphere when applying for a job. In which case, it is always proper to send a follow-up letter or make a follow-up telephone call.

PART A

Directions: Write a follow-up letter after the interview. Use any form you wish or follow the format of the sample follow-up letter included in this assignment sheet.

1. Make sure your letter meets the following standards
    a. Typed or written perfectly
    b. Clean, neat, and attractively arranged on the page
    c. Free from spelling, punctuation, and grammatical errors
    d. Sent within a day or two after the interview
2. Include the following points in your follow-up letter
    a. Expression of appreciation for interviewer's time and interest
    b. Summary of your qualifications and interests in position
    c. Your name, address, and phone number (to make it easier for the employer to contact you)
3. Make this last bid for the job a prime example of your excellent work habits; make the letter clean, neat, and well-worded

ASSIGNMENT SHEET #8

PART B

Directions: Role play a follow-up telephone call using the guidelines below.

1. Make sure you include the following information
    a. Your name
    b. Date of your interview
    c. Position for which you were interviewed
2. Ask whether a decision has been made

    Example: "Hello, Mr. Jones. This is Terry McKracken. I interviewed with you on June 30th for the position of assistant manager. Have you made a decision on my application yet?"
3. If someone has already been hired, thank the interviewer for considering you, but express continued interest in working for the company

    Example: "I am sorry I was not hired. Thank you for at least considering my application. I am still interested in working for the company and would appreciate you keeping my application on file."

ASSIGNMENT SHEET #8

SAMPLE FOLLOW-UP LETTER

Route #3
AnyTown, YourState 77702
July 15, 1983

Mr. John Jones
Owner
Jones' Feed and Seed
Box 19
YourTown, YourState 77704

Dear Mr. Jones:

Thank you for interviewing me for the position of assistant manager with your business. I feel that working for Jones' Feed and Seed would be enjoyable and that I could do the general work that the job requires. Hopefully you will give me the opportunity to prove my worth.

The application form you gave me is enclosed.

I will be available for work August 1. You may call me at my home after 3:30 pm. The number is 405-555-4433.

Sincerely,

Terry McKracken

Terry McKracken

Encl.

(NOTE: Be sure to sign your letter.)

ORIENTATION
UNIT I

ASSIGNMENT SHEET #9 — EVALUATE AN AGRIBUSINESS EMPLOYMENT OFFER

Instead of saying "yes" or "no" on the spot to an employment offer, express your gratitude in a warm and friendly manner, and then ask if you may have time to consider the opportunity you have been offered. Few reputable employers will deny you a reasonable time to be certain before agreeing to take a job.

Use the following checklist to evaluate an employment offer.

THE JOB . . .

Do I clearly understand the nature of the work and is it what I want to do? Are my responsibilities reflected in the job title?

Am I willing to accept the job responsibilities outlined in the job description?

If this isn't my dream job, can it be a stepping stone as I acquire the skills and experience needed for advancement?

Is the background I am building so narrow that I will have difficulty transferring it to another employer?

Will I be able to make any decisions affecting my work? Does it make a difference?

Will I need more training and will the company pay for it?

Will overtime be necessary or available?

Will I be able to leave all thought of the job behind at day's end? If not, does it make a difference?

Will I have to travel or relocate?

Is the job permanent or temporary?

If permanent, is there reasonable job security?

Does the job require union membership?

THE COMPANY . . .

Is the firm too large and heavy with rules for my personality?

Is the firm too small to offer room for advancement or impressive credentials for a future resume?

ASSIGNMENT SHEET #9

Does the firm have a healthy financial position and is it a growing organization?

Is there a high turnover of personnel, and if so, why?

Does the firm promote from within the ranks or turn to outsiders to fill supervisory positions?

Have I met the person who would be my immediate supervisor?

Does the supervisor seem like the sort of person with whom I could get along?

Do co-workers appear to be my kind of people?

Is the company's location convenient?

What is the firm's reputation for fair treatment of employees?

Is a written personnel statement available that covers vacations, sick leave, cause for dismissal, and so forth?

FINANCIAL REWARDS . . .

Do the earnings meet my minimum needs? Are there automatic cost-of-living increases?

What is the method of payment — salary, hourly wage, weekly, bi-monthly, monthly?

Are raises based on merit, length of service, formal exams?

What fringe benefits are given — health insurance, meals, uniforms, vacation, sick leave, and others?

WHEN TO SAY NO . . . Should you always turn down an offer that doesn't measure up?

That depends on several questions. How desperately do you need to earn money? How competitive is the field you hope to enter, and would it be best to get your foot in the door any way you can? How valuable is the experience you'll gain? There are times when it is wise to accept a job which is not perfect in your eyes.

On the other hand, it could be better to refuse the offer.

ORIENTATION
UNIT I

ASSIGNMENT SHEET #10 — COMPARE EMPLOYMENT OPPORTUNITIES

When you are offered a job or are changing jobs, compare employment opportunities before accepting the position. Some factors to consider include:

1. What is your take-home pay?
2. What are the benefits which accompany the position?
3. How much will it cost to actually be at work each day?
4. Would the position be satisfying to you?
5. How would the position meet your needs and aspirations?

TAKE-HOME PAY

Salaries and wages are often quoted by employers as gross earnings. Gross earnings are used because tax deductions vary due to the number of dependents, the amount of earnings, and other information.

Optional benefits and deductions offered by an employer also differ. It is generally advisable to ask what programs are available for enrollment as these can affect the actual money you receive on pay day.

OTHER BENEFITS

Some benefits associated with working are not always visible. Often some of these overlooked benefits are paid for in part by your employer. At the time of the interview or when considering a position ask about employer's contributions for your protection which may include:

1. Health insurance
2. Unemployment compensation
3. Uniforms and meals
4. Medical facilities and health tests
5. Pensions
6. Travel insurance (covering mishaps when traveling on business)
7. Educational programs or reimbursement for courses related to position

ASSIGNMENT SHEET #10

8. Sick leave with pay
9. Paid vacations and holidays
10. Social security
11. Worker's compensation

COSTS ASSOCIATED WITH EMPLOYMENT

Frequently, we often overlook the costs which are associated with being employed. It may be of value to calculate estimated weekly expenses before you make a decision about an employment offer.

Estimate weekly expenses for a job you may be ocnsidering or one designated by your instructor.

Transportation (parking, bus fares)	$__________
Lunches (or cost of food eaten away from home, including soft drinks and coffee)	$__________
Clothing (including cleaning)	$__________
Child care for working parent	$__________
Special uniforms, materials, or equipment	$__________
On the job expenses	$__________
Other	$__________
TOTAL	$__________

OTHER IMPORTANT CONSIDERATIONS

Take-home pay and benefits may be only part of what you want from being employed. Think through other things you consider important.

What are some of the most rewarding things you have felt about any position you've ever had?

1. ____
2. ____
3. ____

ASSIGNMENT SHEET #10

How might you rate these in order of what is important to you?

(NOTE: "1" should be most important.)

_____ Job security (little chance you'll be released from the job)

_____ Opportunity for advancement

_____ Recognition for your work

_____ Good wages

_____ Opportunity to learn and use your ideas

_____ Flexible working hours

_____ Long vacations

_____ Pleasant working conditions

_____ Interesting work

_____ Friendly co-workers

_____ Travel

_____ Other, such as ____

Using information collected in this assignment sheet and the rating above, answer the following questions to help you reach a decision about whether you want a specific job or not.

1. Would the job be satisfying to me? Why/why not?

   ____

   ____

   ____

2. What are the benefits which accompany the job?

   ____

   ____

   ____

ASSIGNMENT SHEET #10

3. How much will it cost to actually be at work each day?

____

____

____

4. How would the position meet my needs and aspirations?

____

____

____

5. I estimate my take-home pay to be $____________________

6. I estimate my expenses related to working to be $____________

7. I would most enjoy the following about this position:

____

____

8. I estimate my employment benefits to be worth $____________

ORIENTATION
UNIT I

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

______a. Experience, education, and physical characteristics which suit a person to a job

______b. Capable of being read; clear

______c. Brief, typed summary of one's qualifications experience, and personal background that is used in applying for a job

______d. Any vocational courses and skills one has learned in school or through job experience

______e. Extras provided by an employer, such as paid vacations, sick leave, and insurance protection

______f. Payment of money for labor or services, usually on an hourly basis

______g. Recognition received for outstanding achievement

______h. Science or art of cultivating the soil, producing crops, raising livestock, and all other aspects of preparing these products to move from producer to consumer

______i. Clubs, organizations, and social or church groups in which one participates

______j. Printed form on which job applicants record information about their personal history, job history, job experience, education, and references

______k. Classified advertisement telling what position is available and what the qualifications are

1. Wage
2. Employment office
3. Agriculture production
4. Qualifications
5. Application form
6. Interview
7. Resumé
8. Award
9. Help wanted ad
10. Legible
11. Fringe benefits

TEST

______l. Business that is designed to help individuals find employment

______m. Meeting of employer and job applicant for purpose of evaluation and questioning

______n. Employer who is making a special effort to assure that no form of discrimination is practiced

______o. Firms and economic enterprises organized to produce and sell services and supplies to farmers for use in farm production and farm living

______p. Reaching a conclusion about something after considering a set of facts, reasons, and alternatives

______q. Personal principles which influence an individual's actions

______r. Written statement outlining responsibilities of an individual within a business or industry

12. Job description
13. Extracurricular activities
14. Vocational preparation
15. Equal opportunity employer
16. Decision making
17. Values
18. Agribusiness

2. Circle the words which best complete the following statements concerning the importance of agribusiness and production agriculture to the economy.

   a. Approximately **(15, 23)** percent of all workers owe their employment directly to production agriculture and agricultural businesses

   b. Approximately **(3.5, 2.5)** million people operate commercial farms

   c. For each operating farmer there are approximately **(seven, five)** other people working in agri-related occupations

   d. Approximately 13 **(billion, million)** dollars are spent each year for production, supplies, and service

   e. Owners and managers of agricultural businesses prefer to hire people with **(an agricultural, a business)** background or training in agriculture

TEST

3. Match eight broad occupational areas of agribusiness to their correct subareas. Place the number of the area in the blank beside the subarea.

(NOTE: The numbers can be used more than once.)

______a. Logging

______b. Animal science

______c. Fertilizers

______d. Soil, air, and water

______e. Landscaping

______f. Buying and marketing

______g. Agricultural power and machinery

______h. Food products

______i. Agricultural consultant

______j. Turf management

______k. Agricultural construction and maintenance

______l. Government programs

1. Agricultural production
2. Agribusiness
3. Agricultural sales and service
4. Agricultural mechanics
5. Agricultural products
6. Ornamental horticulture
7. Agricultural resources
8. Forestry

4. Select means of locating employment by placing an "X" in the appropriate blanks.

______a. Former employers

______b. Waiting to be called

______c. School officials

______d. Employment offices

______e. Current workers in agribusiness

______f. Friends and neighbors

TEST

5. List five factors to consider when choosing an occupation.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

6. Arrange in order the steps to take in being employed by numbering from one to eight.

_____a. Fill out an application

_____b. Follow up the interview

_____c. Choose your field

_____d. Interview

_____e. Locate employment opportunities

_____f. Prepare a personal resumé

_____g. Arrange for an interview

_____h. Write a letter of application if appropriate

7. Arrange in order the steps in making a good decision by numbering from one to eight.

_____a. Consider the alternatives

_____b. Act

_____c. Get the facts

_____d. Make the decision

_____e. Identify the problem

_____f. Follow-up, evaluate, and revise as necessary

_____g. Relate the problem to your own values

_____h. Weigh the facts and evaluate them

_____i. Accept the consequences

TEST

8. Select personal attributes or attitudes an employer looks for during a personal interview by placing an "X" in the appropriate blanks.

_____a. Alertness, quickness of mind

_____b. Unkept hair

_____c. Dedication and dependability

_____d. Enthusiasm and interest

_____e. New car

_____f. Honesty and integrity

_____g. Desire to work

_____h. Flashy clothes

_____i. Desire to improve skills

_____j. Ability to work well with others

9. Select true statements concerning preparing for an interview by placing an "X" in the appropriate blanks.

_____a. Wear appropriate clothing and shoes

_____b. Take parents or friends along with you

_____c. Be well-groomed and neat

_____d. Find out facts about the interviewer ahead of time

_____e. Be at least ten minutes late

_____f. Take a pencil and copy of your resumé

_____g. Know facts about the business

10. List six positive ways to begin an interview.

a. ____

b. ____

c. ____

TEST

d. ______________________________

e. ______________________________

f. ______________________________

11. Circle the words which best complete the following statements concerning special considerations for answering questions clearly.

    a. Anticipate questions that might be asked and **(withhold, volunteer)** proper information

    b. **(Include, Avoid)** criticizing former employers or competitors

    c. Answer all questions **(honestly, evasively)**

    d. Give **(positive, negative)** answers to unfavorable questions

    e. Try to mention your best qualities in relation to **(something concrete, someone else)**

    f. **(Encourage, Avoid)** questions concerning politics, economics, religion and other controversial subjects

    g. Answer questions about career objectives using **(general, specific)** terms about what you would like to do in the near future in that particular field without limiting your opportunities

12. Select ways to maintain an interviewer's interest by placing an "X" in the appropriate blanks.

    ______a. Look away from interviewer

    ______b. Speak in clear, moderate tones

    ______c. Use correct English

    ______d. Show interest in the salary; ask questions

    ______e. Sell yourself

    ______f. Act uninterested

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

13. Compile a list of employment opportunities in agribusiness in your community.

14. Apply steps in making a decision.

TEST

15. Write a resumé.
16. Write a letter of application for employment in agribusiness.
17. Complete an employment application form for a position in agribusiness.
18. Practice interview questions.
19. Make an appointment by phone for an agribusiness employment interview.
20. Write a follow up letter or make a follow up phone call after interviewing for an agribusiness position.
21. Evaluate an agribusiness employment offer.
22. Compare employment opportunities.

ORIENTATION
UNIT I

ANSWERS TO TEST

1.

a.	4	f.	1	k.	9	p.	16
b.	10	g.	8	l.	2	q.	17
c.	7	h.	3	m.	6	r.	12
d.	14	i.	13	n.	15		
e.	11	j.	5	o.	18		

2.

a.	23
b.	2.5
c.	Seven
d.	Billion
e.	An agricultural

3.

a.	8	g.	4
b.	1	h.	5
c.	3	i.	2
d.	7	j.	6
e.	6	k.	4
f.	2	l.	2

4. a, c, d, e, f

5. Any five of the following:

   a. Interests and hobbies
   b. Salary
   c. Advancement opportunities
   d. Security for the future
   e. Working conditions
   f. Interpersonal relationships with co-workers and employer
   g. Location

6.

a.	5	e.	2
b.	8	f.	3
c.	1	g.	6
d.	7	h.	4

7.

a.	4	f.	8
b.	7	g.	5
c.	2	h.	3
d.	6	i.	9
e.	1		

8. a, c, d, f, g, i, j

ANSWERS TO TEST

9. a, c, d, g

10. Any six of the following:

    a. Smile and establish eye contact
    b. Listen carefully
    c. Enter with poise
    d. Greet the interviewer by name
    e. Shake hands firmly
    f. Introduce yourself
    g. State purpose of call
    h. Be seated only at interviewer's invitation
    i. Do not show signs of nervousness
    j. Do not place personal things on interviewer's desk
    k. Do not smoke or chew gum
    l. Look alert, interested, and enthusiastic

11. a. Volunteer
    b. Avoid
    c. Honestly
    d. Positive
    e. Something concrete
    f. Avoid
    g. Specific

12. b, c, e

13-22. Evaluated to the satisfaction of the instructor

TRAINING PLAN/AGREEMENT
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to state the purposes of the training plan and training agreement, match signers of the training agreement with their responsibilities, select criteria for job evaluation, and complete a job record sheet. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheet and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. State the purpose of the training plan.
2. State the purpose of the training agreement.
3. Match signers of the training agreement with their responsibilities.
4. State the purpose of a job record.
5. Select criteria for job evaluation.
6. Select true statements concerning guidelines for student-learner certification.
7. Complete a job record sheet.

TRAINING PLAN/AGREEMENT
UNIT II

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Meet with employers to develop a job training plan for each student.

VII. Discuss job training plan with each student.

VIII. Provide students and employers with examples of training plans.

IX. Assist students in obtaining work permits as necessary.

X. Discuss job evaluation procedure with students. Refer to suggested evaluation sheets which have been included in the introductory material in this book.

XI. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Training Plan

    2. TM 2 — Training Agreement

    3. TM 3 — Job Record

  D. Assignment Sheet #1 — Complete a Job Record Sheet

  E. Answers to assignment sheet

  F. Test

  G. Answers to test

INSTRUCTIONAL MATERIALS

II. References:

A. Carlile, Robert. *Agriculture Sales and Service.* Stillwater OK: Mid-America Vocational Curriculum Consortium, 1976.

B. WH Publication 1250, *Employment of Full-Time Students at Subminimum Wages Under the Fair Labor Standard Act.* Washington, D.C.: U.S. Department of Labor, 1980.

III. Additional references:

A. WH Publication 205, *Information Guide and Instructions for Completing Application for Authorization to Employ a Student-Learner at Subminimum Wages.* Washington D.C.: U.S. Department of Labor, 1978.

B. WH Publication 1982, *Handy Reference Guide to the Fair Labor Standards Act.* Washington, D.C.: U.S. Department of Labor, 1982.

TRAINING PLAN/AGREEMENT
UNIT II

INFORMATION SHEET

I. **Purpose of the training plan** — To provide each student with a list of objectives to reach during the training period as determined by the instructor and employer (Transparency 1)

II. **Purpose of the training agreement** — To establish each party's responsibilities to the training program (Transparency 2)

III. **Signers of the training agreement and their responsibilities**

A. Employer

1. Must meet Social Security, State and Federal Income Tax and Worker's Compensation requirements
2. Must meet U.S. Fair Labor Standards Act (U.S. Wage and Hours Law) and Title 6 of the Civil Rights Provision
3. Should be willing to pay wages on-the-job comparable to other employees of the same age and with the same experience
4. Will assist instructor in development of student's training plan
5. Should assist instructor-coordinator in evaluating the trainee in terms of competencies attained and working ability
6. Must have occupational experience opportunities necessary for student to attain the objectives of the training plan
7. Should not terminate employment of a trainee, except in the case of dishonesty, without first consulting the instructor
8. Will cooperate with the instructor in arranging a conference with the student on supervisory visits
9. Will not subject the student to unnecessary hazards
10. Will notify the parents and instructor immediately in case of accident or sickness
11. Will assign the student new responsibilities only when, in the judgment of the employer, he/she can handle them

B. Student

1. Will assist instructor in development of training plan

INFORMATION SHEET

2. Fulfill the training in such a manner that it will reflect credit upon himself/herself, the employer, and the school

3. Will be punctual, dependable, and loyal

   (NOTE: The student should inform the employer at the earliest possible time if work must be missed.)

4. May not sever connection with employer without the knowledge and consent of the instructor

5. Dishonesty on the part of the trainee will result in immediate removal from the training program

6. Will complete the necessary forms and reports required by the employer and the school

7. Will be courteous and considerate of the employer, employees, and others

8. Must dress properly for work and conform to the rules and regulations of the training station

9. Will follow instructions, *avoid unsafe acts*, and *be alert to unsafe conditions*

10. Will be alert to perform unassigned tasks which promote the welfare of the business, such as keeping a plant or store neat and tidy

11. Will achieve competencies indicated in training plan

C. Instructor-coordinator

1. Will coordinate the development of the student's training plan

2. Will assist student in obtaining a work permit and suitable employment

3. Will provide a copy of the training plan and agreement to the school, employer, student, and parents

4. Will parallel employment training with classroom instruction

5. Will visit student on the job to insure that proper experiences and competencies are being learned

6. Show discretion as to the time and circumstances for visits, especially when work is pressing

INFORMATION SHEET

7. Shall endeavor to adjust all complaints with the cooperation of the parties concerned

8. Will reserve the right to withdraw or transfer the student at any time an undesirable training situation becomes apparent

D. Parents or guardian

1. Assist the employer, student, and teacher in promoting the value of the student's experience

2. Assist in providing transportation to and from the place of employment

3. Satisfy themselves in regard to the working conditions made available to the student

IV. **Purpose of a job record** — To provide a record of student's hours on the job and to provide an overview of student's work experience to insure that objectives established in the training plan are being met (Transparency 3)

(NOTE: Most states have a minimum number of hours which must be spent on the job to fulfill course requirements.)

V. **Criteria for job evaluation**

(NOTE: Job evaluations will be completed by the teacher and employer for each grading period or as necessary.)

A. Personal appearance

B. Attitude concerning work

C. Attitude concerning others

D. Ability to perform required tasks

E. Responsibility

F. Dependability

G. Initiative

INFORMATION SHEET

VI. **Guidelines for student-learner certification**

A. Employer must complete and send in an application for authority to employ full-time students at a subminimum wage

B. Application must be mailed on or before the first day of employment

C. Student must be at least 16 years of age and receiving instruction under a vocational training program administered in accredited school

D. Job training must be supplemented with technical knowledge and related information given as a regular part of student's course of study

E. Hours of work plus hours in school may not exceed 40 hours at subminimum rate

F. Hours may not exceed 40 at work when school is not in session

G. Students receive a subminimum rate not less than 75 percent of minimum wage

H. Period of training may not exceed one school year unless a longer period has been approved

Training Plan

Name of Student: Bob Wheatley

Teacher's Name: Gene Hilgenberg

Student's Occupational Objective: Employment in Agribusiness

Beginning Date: 09-02-84 Ending Date: 05-15-85

Training Station: Bates' Feed and Seed

Rating Scale:
1. Can perform well enough to supervise others/well above average
2. Can perform without supervision/average
3. Can perform with supervision/below average
4. Has not accomplished

Work Experience and/or Competencies	Targeted Starting Date	Rating of Performance
1. Demonstrate the ability to get along with others	Sept. 1	1
2. Demonstrate the ability to work on his own	Sept. 1	2
3. Demonstrate a willingness to learn or take supervision	Sept. 1	1
4. Accept routine tasks without becoming disinterested	Sept. 1	2
5. Practice positive human relations	Sept. 1	2
6. Learn location of feeds in the warehouse	Sept. 1	2
7. Maintain a clean warehouse at all times	Sept. 1	1
8. Fill feed bags using auger	Oct. 1	1
9. Sew feed bags using electric sewing machine	Oct. 1	1
10. Load bag feed for customers	Sept. 10	1
11. Load bulk feed from the elevator	Oct. 1	3
12. Maintain mechanical equipment in warehouse	Sept. 10	2
13. Weight grain as it arrives at the elevator	Nov. 1	2
14. Diagram efficient facility layouts for modern grain, feed, seed and fertilizer operations	Nov. 1	2
15. Understand common feed, seed, grain, and fertilizer laws particular to businesses line of products	Nov. 1	3
16. Demonstrate the ability to complete a sales ticket	Dec. 1	2
17. Identify all major lines of products handled by the business	Dec. 1	2
18. Explain all credit procedures of the business	Dec. 1	2
19. Diagram the sales floor of the business and identify location of product lines	Dec. 15	2
20. List goals to accomplish while working on the sales floor	Jan. 1	1

Training Agreement

To provide a basis of understanding and to promote sound business relationships, this agreement is established on ____________,
19______ and will begin on ____________,
19______ and will end on or about ________,
19______ unless the arrangement becomes unsatisfactory to either party.

Name of Agribusiness____________

Name of Supervisor____________

The usual working hours will be as follows:
  While attending school____________
  When not attending school____________

Provision for overtime____________

Liability Insurance coverage (type and amount)____________

Length of Trial Period and Wage Rate____________

Wage Rate for the remainder of Agreement Period____________

Frequency of Payment____________

It is understood that the employer will:

Provide the student with opportunities to learn how to do well as many jobs as possible, with particular reference to those contained in their Placement Plans.

Instruct the student in ways of doing his/her work and handling his/her management problems.

Help the teacher make an honest appraisal of the student's performance.

Avoid subjecting the student to unnecessary hazards.

Notify the parents and the teacher immediately in case of accident or sickness and if any other serious problem arises.

Assign the student new responsibilities in keeping with his/her progress.

Cooperate with the teacher in arranging a conference with the student on supervisory visits.

Other (Include all other points that the employer will have the responsibility to provide on a separate sheet.)

The student agrees to:

Do an honest day's work.

Keep the employer's interest in mind; be punctual, dependable and loyal.

Follow instructions, avoid unsafe acts and be alert to unsafe conditions.

Be courteous and considerate of the employer, his family and his employees.

Keep records of occupational experience and make required reports.

Achieve competencies indicated in placement plan.

Other (In case there are additional student responsibilities, they should be included on a separate sheet.)

The teacher, in behalf of the school, agrees to:

Check and approve the placement center.

Provide a copy of the agreement to the school and employer.

Schedule class instruction to prepare students for occupational experience.

Visit the student on the job at frequent intervals for the purpose of instruction and to insure that the student gets the most education out of the experience.

Show discretion at the time and circumstances of these visits, especially when the work is pressing.

Assist the student in obtaining a work permit and developing a placement plan.

Other (Additional teacher responsibilities should be added on a separate sheet.)

The parents agree to:

Assist in promoting the value of the student's experience by cooperating with the employer and teacher.

Satisfy themselves in regard to the living and working conditions made available to the student.

Assist in providing transportation to and from the placement center according to work schedule.

Other (Additional items agreed to by the parents should be included on a separate sheet.)

All parties agree to:

An initial trial period of ________ working days to allow the student to adjust to the job.

Discuss the issues with the teacher before ending employment.

Other (list on separate sheet.)

STUDENT____________
(Signature)

Address____________

Social Security No.____________

Tel. No.____________

Date of Birth____________ Age____________

PARENT____________
(Signature)

Address____________

Tel. No.____________

EMPLOYER____________
(Signature)

Address____________

Tel. No.____________

TEACHER____________
(Signature)

Address____________

Tel. No.____________ School Tel. No.____________

Job Record

Student-Trainee Bobby Jones **Training Station** Farmers' Implement Co.

Week Beginning February 1 **to** February 7 **Type of Training** Parts Clerk

Week No. 3

Weekly Time and Duty Summary

	Time In	Time Out	Hrs. Worked	Major Duties Performed
Monday	1:30	5:00	3½	Counter Sales
Tuesday	1:30	3:34	2	Taking Inventory, Ordering Parts
Wednesday	1:27	5:10	3½	Receiving, Stocking Parts
Thursday	1:29	3:31	2	Counter Sales, Stocking Parts
Friday	1:30	4:34	3	Counter Sales
Saturday	8:58	12:03	3	Warehouse
Sunday	—	—	—	

Salary Per Hr. $ 3.75 **Total Hrs. Worked** 17 **Gross Salary Per Week** $ 63.75

STUDENT COMMENTS: (New Skills, Mistakes, and Difficulties)

* Turn into vocational agriculture teacher each week

Signature Bobby Jones
Student Trainee

TRAINING PLAN/AGREEMENT
UNIT II

ASSIGNMENT SHEET #1 — COMPLETE A JOB RECORD SHEET

Directions: Complete the job record sheet on the following page using the information below.

A. Your name

B. Training station — Farmers' Implement Co.

C. Type of training — Parts clerk

D. Week beginning/to — Week assignment is completed

E. Week number — 1

F. Time in/out

   Monday — 1:30 to 5:00
   Tuesday — 1:30 to 3:34
   Wednesday — 1:27 to 5:10
   Thursday — 1:29 to 5:01
   Friday — 1:30 to 5:04
   Saturday — 7:58 to 12:03

G. Hours worked daily — Round off to nearest half hour

H. Major duties performed

   Monday — Counter sales
   Tuesday — Taking inventory, ordering parts
   Wednesday — Receiving, stocking parts
   Thursday — Counter sales, stocking parts
   Friday — Counter sales
   Saturday — Counter sales

I. Salary per hour — $3.35

J. Total hours worked — Total daily hours for week

K. Salary per week — Multiply total hours for week by salary per hour

L. Signature — Sign job record

80-A

Job Record

Student-Trainee ______________________ Training Station ______________________
Week Beginning ____________ to ____________ Type of Training ______________________
Week No. ________

Weekly Time and Duty Summary

	Time In	Time Out	Hrs. Worked	Major Duties Performed
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Salary Per Hr. __________ Total Hrs. Worked ________ Gross Salary Per Week __________

STUDENT COMMENTS: (New Skills, Mistakes, and Difficulties)

______________________________ Signature ______________________
Student Trainee

* Turn into vocational agriculture teacher each week

ASSIGNMENT SHEET #1

ANSWERS TO ASSIGNMENT SHEET #1

Job Record

Student-Trainee Your Name **Training Station** Farmers' Implement Co.

Week Beginning Week Assignment Is Completed **to** Week Assignment Is Completed **Type of Training** Parts Clerk

Week No. 1

Weekly Time and Duty Summary

	Time In	Time Out	Hrs. Worked	Major Duties Performed
Monday	1:30	5:00	1½	Counter Sales
Tuesday	1:30	3:34	2	Taking Inventory, Ordering Parts
Wednesday	1:27	5:10	3½	Receiving, Stocking Parts
Thursday	1:29	5:01	3½	Counter Sales, Stocking Parts
Friday	1:30	5:04	3½	Counter Sales
Saturday	7:58	12:03	4	Counter Sales
Sunday	—	—	—	

Salary Per Hr. 3.35 **Total Hrs. Worked** 20 **Gross Salary Per Week** $ 67.00

STUDENT COMMENTS: (New Skills, Mistakes, and Difficulties)

* Turn into vocational agriculture teacher each week

Signature Your Signature
Student Trainee

TRAINING PLAN/AGREEMENT
UNIT II

NAME ______________________

TEST

1. State the purpose of the training plan.

____

____

____

2. State the purpose of the training agreement.

____

____

____

3. Match signers of the training agreement on the right with their responsibilities.

_____a. Will assist instructor-coordinator in evaluating the trainee in terms of competencies attained and working ability

_____b. Must dress properly for work and conform to the rules and regulations of the training station

_____c. Will follow instructions, *avoid unsafe acts,* and *be alert to unsafe conditions*

_____d. Will parallel employment training with classroom instruction

_____e. Satisfy themselves in regard to the working conditions made available to the student

_____f. Must have occupational experience opportunities necessary for student to attain the objectives of the training plan

_____g. Shall endeavor to adjust all complaints with the cooperation of the parties concerned

_____h. Assist in providing transportation to and from the place of employment

1. Employer
2. Student
3. Instructor-coordinator
4. Parents or guardian

TEST

_____i. Will not subject the student to unnecessary hazards

_____j. Will visit student on the job to insure that proper experiences and competencies are being learned

4. State the purpose of a job record.

____

____

____

5. Select criteria for job evaluation by placing an "X" in the appropriate blanks.

_____a. Ability to perform tasks away from work

_____b. Dependability

_____c. Attitude concerning others

_____d. Initiative

_____e. Personal appearance

_____f. Responsibility

_____g. Mode of transportation

_____h. Attitude concerning work

6. Select true statements concerning guidelines for student-learner certification by placing an "X" in the appropriate blanks.

_____a. Students must complete and send in an application for authority to employ full-time students at a subminimum wage

_____b. Application must be mailed on or before the first day of employment

_____c. Student must be at least 14 years of age and receiving instruction in any training program administered in an accredited school

_____d. Job training may supplement technical knowledge and related information given as a regular part of student's course of study

TEST

_____e. Hours of work plus hours in school may not exceed 40 hours at subminimum rate

_____f. Students receive a subminimum rate not less than 50 percent of minimum wage

_____g. Period of training may not exceed one school year unless a longer period has been approved

(NOTE: If the following activity has not been accomplished prior to the test, ask your instructor when it should be completed.)

7. Complete a job record sheet.

TRAINING PLAN/AGREEMENT
UNIT II

ANSWERS TO TEST

1. To provide each student with a list of objectives to reach during the training period as determined by the instructor and employer

2. To establish each party's responsibilities to the training program

3.

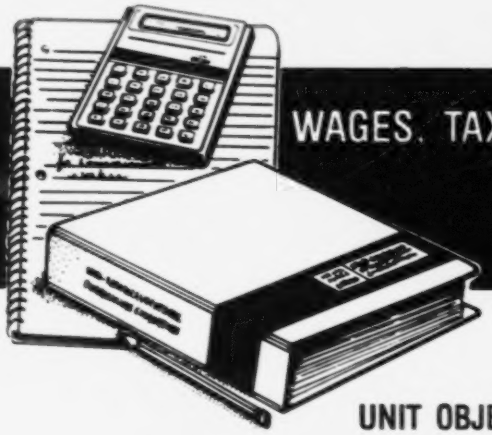
a.	1
b.	2
c.	2
d.	3
e.	4
f.	1
g.	3
h.	4
i.	1
j.	3

4. To provide a record of student's hours on the job and to provide an overview of student's work experience to insure that objectives established in the training plan are being met

5. b, c, d, e, f, h

6. b, e, g

7. Evaluated to the satisfaction of the instructor



WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

UNIT OBJECTIVE

After completion of this unit, the student should be able to select legal aspects of employment, list three benefits paid from Social Security, and list fringe benefits that employers may offer. The student should also be able to figure take-home pay. This knowledge will be evidenced by correctly performing the procedure outlined in the assignment sheet and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to wages, taxes, and fringe benefits with their correct definitions.
2. Select legal aspects of employment.
3. Complete a list of statements concerning payroll check deductions.
4. Select true statements concerning the method of obtaining a Social Security card.
5. List three benefits paid from Social Security.
6. Select true statements concerning features of worker's compensation insurance.
7. Circle the words which best complete statements concerning characteristics of unemployment insurance.
8. List fringe benefits that employers may offer.
9. Figure take-home pay.

WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Contact a local agribusiness manager to speak to class on wages, taxes, and fringe benefits.

VII. Provide students with wage and salary figures for various agribusiness positions in your area.

VIII. Provide students with pamphlets from the U.S. Government which explain income tax, Social Security, worker's compensation, and various labor laws.

IX. Provide students with a copy of child labor laws in your state.

X. Demonstrate how to complete a W-4 form.

XI. Demonstrate how to figure take-home pay.

XII. Demonstrate how to complete a tax return.

XIII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

    A. Objective sheet

    B. Information sheet

    C. Transparency masters

        1. TM 1 — Payroll Check Deductions

        2. TM 2 — Form W-4 (Employee's Withholding Allowance Certificate)

INSTRUCTIONAL MATERIALS

3. TM 3 — Social Security Card

D. Assignment Sheet #1 — Figure Take-Home Pay

E. Answers to assignment sheet

F. Test

G. Answers to test

II. References:

A. U.S. Department of Labor, Wage and Hour Division. *Handy Reference Guide to the Fair Labor Standards Act.* W.H. Publication No. 1282. Washington: Government Printing Office, 1982.

B. U.S. Department of Labor, Wage and Hour Division. *Child Labor Requirements for Agricultural Occupations.* Bulletin No. 102. Washington: Government Printing Office, 1978.

C. U.S. Department of Labor, Wage and Hour Division. *Employment for Student-Learners.* W.H. Publication No. 1343. Washington: Government Printing Office, 1976.

D. U.S. Department of Labor, Wage and Hour Division. *Employment of Full-Time Students at Subminimum Wages.* W.H. Publication No. 1223. Washington: Government Printing Office, 1975.

E. U.S. Department of Health and Human Services. Social Security Administration. *What You Have to Know About Social Security Insurance.* Washington: Government Printing Office, 1983.

F. U.S. Department of Health and Human Services. Social Security Administration. *Your Social Security Rights and Responsibilities.* Washington: Government Printing Office, 1983.

WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

INFORMATION SHEET

I. **Terms and definitions**

A. Advancement — Promotion or elevation to a higher position

B. F.I.C.A. — Federal Insurance Contributions Act; Legislation governing Social Security, disability insurance, and Medicare

(NOTE: This is commonly referred to as Social Security.)

C. Fringe benefits — Extras provided by an employer, such as paid vacations, sick leave, and insurance protection

D. I.R.S. — Internal Revenue Service; government agency which collects income tax and FICA payments from employers

E. Overtime — Work performed beyond a 40-hour work week in which an employee is usually paid 1 1/2 times regular pay rate

F. Pension — A fixed sum paid to an individual following retirement from service

G. Profit sharing — Process under which employees receive a part of the profits of an industrial or commercial business

H. Social Security Program — Method of providing income to individuals when earnings are reduced or stopped as a result of retirement, disability, or death

(NOTE: Social security is not intended to replace all lost earnings and individuals should supplement payments with savings, pensions, or other investments.)

I. Wage — Payment of money for labor or services, usually on an hourly basis

(NOTE: Another term for wage is salary which is generally paid on a weekly, bi-weekly, or monthly basis.)

J. Withholding taxes — Money deducted from an individual's paycheck which is sent to the federal government for the employees income tax payment

(NOTE: This tax is paid by the employer to the federal government quarterly to meet the obligations of the federal budget.)

INFORMATION SHEET

K. Worker's compensation — A law which requires employers to take responsibility and cover employees in the event of an injury resulting from an accident which occurs as a result of or in the course of a worker's employment

II. Legal aspects of employment

A. Fair Labor Standards Act

1. Federal Child Labor Law

2. State Child Labor Law

(NOTE: Refer to individual state regulations.)

Example:

Oklahoma	Must be 21 to operate a motor vehicle as a common carrier. Must be 16 to be employed cleaning or oiling dangerous machinery, or (4), (5), (6), (7), and (8). No minor under 16 may do work hazardous to life and limb. Such activities include messenger service, delivery service except on foot, or working establishment where beer is served. May use power lawn mower. And may work where beer is served if it constitutes less than 25 percent of the total business.	Must be 15: 8 hours per day, 48 per week with 1 hour for meals and rest. (Non-school days.) May not work during school hours.	Over 16: no restrictions. Under 16: May not work during school hours and only until 11:00 p.m.

B. Maximum hours

C. Minimum wage

D. Employment of minors

E. Unemployment insurance

F. Worker's compensation

G. Withholding tax

H. Social Security

(NOTE: Items E through H are types of deductions made on a payroll check.)

INFORMATION SHEET

III. **Payroll check deductions** (Transparency 1)

A. Federal and state income tax — Calculated by a formula using the withholding allowances from an employee's Form W-4 (Transparency 2)

(NOTE: An individual must file a tax return each year to recover any tax that was overpaid or to pay any additional tax that may be due.)

B. Social Security tax (FICA) — Employer and employee match contributions which represent 7% of the total wages paid

(NOTE: This percent may change as directed by law.)

C. Federal unemployment tax — Is paid by the employer only and finances unemployment insurance

D. Optional deductions — Benefits offered by an employer which may be deducted from the employee's paycheck

Examples: Life and health insurance, credit union, savings bonds, retirement plans

IV. **Methods of obtaining a Social Security card** (Transparency 3)

(NOTE: The number printed on your Social Security card is yours for your lifetime and is used to keep a record of your earnings for income tax purposes.)

A. Apply for a Social Security card at any Social Security office or pick up an application form at post office

B. Apply for the card at least two weeks prior to starting your first job

C. Provide evidence of your age, identity, citizenship, or immigrant status

V. **Benefits paid from Social Security**

A. Retirement benefits — Paid to individual who reaches retirement age and who has contributed to Social Security at least ten years

(NOTE: Amount of benefits will be determined by age of individual, number of years in work force, and salary at time of retirement. Questions about any aspect of Social Security should be directed to the Social Security Administration, Washington, D.C.)

B. Death benefits — Paid to dependents of eligible Social Security recipients

C. Disability benefits — Paid to an individual if an illness or injury is expected to last a year or longer

INFORMATION SHEET

VI. **Features of worker's compensation insurance**

A. Cost is paid by employee

B. Employer may purchase insurance from a private company or state owned fund

C. Only injuries which occur on the job are covered

D. Treatment for an injury or occupational disease is covered

E. Compensation benefits are provided if more than three days of work are missed

F. Compensation benefits are provided for temporary and permanent disabilities

G. In case of death, compensation benefits are provided for surviving dependents

(NOTE: For more information, contact your employment personnel office.)

VII. **Characteristics of unemployment insurance**

A. Unemployment insurance is supervised by a state agency

B. Cost of insurance is paid by employer

C. Benefits are paid if employment is terminated due to a layoff or firing

(NOTE: Benefits are not paid if an employee resigns on his/her own.)

D. Size of benefits depends on wages earned by individual and the state employed in

E. Length of benefits will vary from state to state

(NOTE: For more information, contact your local state employment office.)

VIII. **Fringe benefits that employers may offer**

A. Life and health insurance

(NOTE: The employer may fully pay for insurance or offer policy at reduced rates to the employee and his/her family.)

B. Credit unions

1. Savings accounts with automatic payroll deductions
2. Low interest loans for members

INFORMATION SHEET

C. Paid annual leave

D. Paid sick leave

E. Profit sharing

F. Bonuses

G. Pension plans

H. Paid education

I. Advancement

J. Pleasant working conditions

K. Employee discounts

L. Job expense reimbursement

M. Clothing allowance

N. Travel expense reimbursement

Payroll Check Deductions

August 31, 1984	Bobby Jones	000-00-000	**Net Amount** 178.32
Date	**Name**	**Social Security Number**	

This card is furnished for your convenience in order to keep a personal record of your monthly payroll deductions. Please transfer the amounts from your payroll warrant to this card.

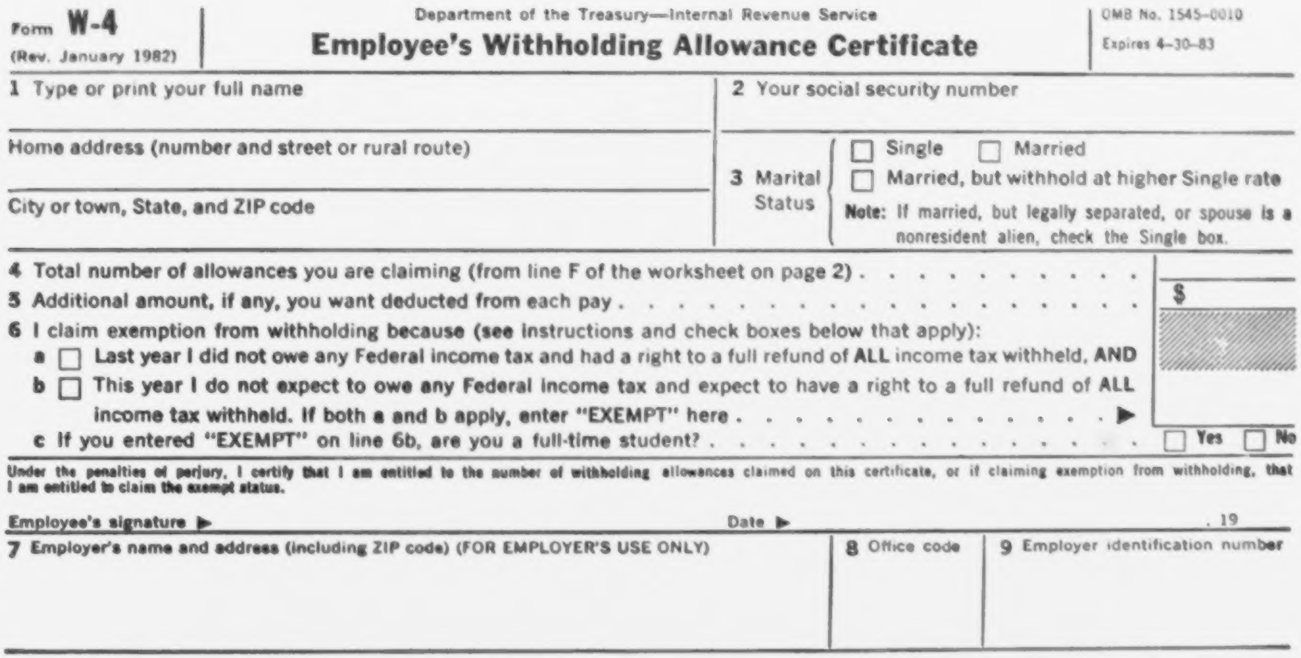
Annuity	Gross Amount	Federal W. H. Tax	State W. H. Tax
	234.00	14.10	.90

Insurance	Retirement	Other	Bonds	Credit Union	FICA
				25.00	15.68

TM 1

EA-99-A

Form W-4
(Employee's Withholding Allowance Certificate)



Form **W-4** (Rev. January 1982)

Department of the Treasury—Internal Revenue Service

Employee's Withholding Allowance Certificate

OMB No. 1545-0010
Expires 4-30-83

1 Type or print your full name

2 Your social security number

Home address (number and street or rural route)

City or town, State, and ZIP code

3 Marital Status ☐ Single ☐ Married
☐ Married, but withhold at higher Single rate
Note: If married, but legally separated, or spouse is a nonresident alien, check the Single box.

4 Total number of allowances you are claiming (from line F of the worksheet on page 2) . . . .

5 Additional amount, if any, you want deducted from each pay . . . . $

6 I claim exemption from withholding because (see instructions and check boxes below that apply):

a ☐ Last year I did not owe any Federal income tax and had a right to a full refund of ALL income tax withheld, AND

b ☐ This year I do not expect to owe any Federal income tax and expect to have a right to a full refund of ALL income tax withheld. If both a and b apply, enter "EXEMPT" here . . . . ▶

c If you entered "EXEMPT" on line 6b, are you a full-time student? . . . . ☐ Yes ☐ No

Under the penalties of perjury, I certify that I am entitled to the number of withholding allowances claimed on this certificate, or if claiming exemption from withholding, that I am entitled to claim the exempt status.

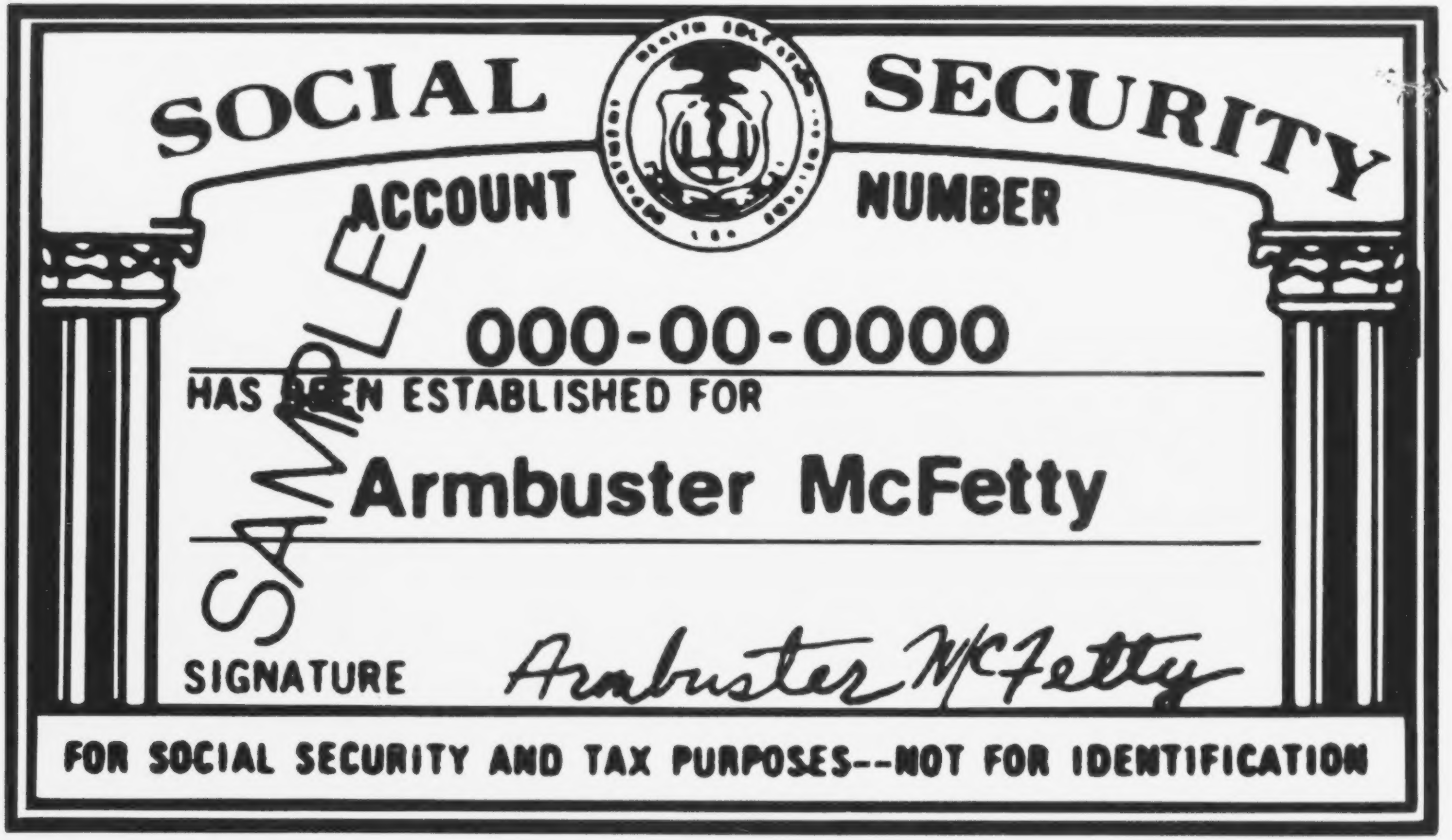
Employee's signature ▶ Date ▶ , 19

7 Employer's name and address (including ZIP code) (FOR EMPLOYER'S USE ONLY)

8 Office code

9 Employer identification number

Social Security Card



SOCIAL SECURITY

ACCOUNT NUMBER

000-00-0000

HAS BEEN ESTABLISHED FOR

Armbuster McFetty

SIGNATURE Armbuster McFetty

FOR SOCIAL SECURITY AND TAX PURPOSES--NOT FOR IDENTIFICATION

SAMPLE

WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

ASSIGNMENT SHEET #1 — FIGURE TAKE-HOME PAY

Directions: Determine the take-home pay for each of the following situations.

(NOTE: FICA is based on approximately 7% of an individual's total earnings.)

A. Cindy Farmer works twenty hours a week at the Farmer's Market and earns $3.25 an hour.

    1. What is her total weekly pay (gross amount)? $__________
    2. What is the amount of state and federal tax withheld if 20% is deducted from Cindy's pay? $__________
    3. What is the FICA deduction? $__________
    4. What is the amount of total deductions? $__________
    5. What is Cindy's take-home pay? $__________

B. Bobby Jones is working full-time at Russell's Farm Supply and puts in at least a 40-hour work week. This week Bobby worked 48 hours. He is paid $4.50 an hour.

    1. How much did Bobby earn in overtime pay? $__________
    2. How much did Bobby earn the first 40 hours? $__________
    3. What is Bobby's total weekly pay? $__________
    4. What is the amount of state and federal tax withheld if 22% is deducted from Bobby's pay? $__________
    5. What is the FICA deduction? $__________
    6. What is the amount of total deductions? $__________
    7. What is Bobby's take-home pay? $__________

C. Matt Wilson is a warehouse manager for a local co-op and has been employed there for three years. He is presently paid $9.30 an hour and often works in excess of 40 hours, especially during harvest. Matt just finished a 55 hour work week.

    1. How much did Matt earn in overtime pay? $__________
    2. How much did Matt earn the first 40 hours? $__________

ASSIGNMENT SHEET #1

3. What is Matt's total weekly pay? $________

4. What is the amount of state and federal tax withheld if 23% is deducted from Matt's pay? $________

5. What is the FICA deduction? $________

6. What is the amount of total deductions if Matt pays $15.00 for extra life insurance and has $50 automatically deposited in the co-op credit union? $________

7. What is Matt's take-home pay? $________

WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

ANSWERS TO ASSIGNMENT SHEET

A.
1. $65.00
2. $13.00
3. $ 4.55
4. $17.55
5. $47.45

B.
1. $ 54.00
2. $180.00
3. $234.00
4. $ 51.48
5. $ 16.38
6. $ 67.86
7. $166.14

C.
1. $209.25
2. $372.00
3. $581.25
4. $133.69
5. $ 40.69
6. $239.38
7. $341.87

WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

NAME ____________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. Extras provided by an employer, such as paid vacations, sick leave, and insurance protection

_____b. Method of providing income to individuals when earnings are reduced or stopped as a result of retirement, disability, or death

_____c. Promotion or elevation to a higher position

_____d. Legislation governing Social Security, disability insurance, and Medicare

_____e. A fixed sum paid to an individual following retirement from service

_____f. Work performed beyond a 40-hour work week in which an employee is usually paid 1 ½ times regular pay rate

_____g. Payment of money for labor or services, usually on an hourly basis

_____h. Process under which employees receive a part of the profits of an industrial or commercial business

_____i. Government agency which collects income tax and FICA payments from employers

_____j. Money deducted from an individual's paycheck which is sent to the federal government for the employee's income tax payment

_____k. A law which requires employers to take responsibility and cover employees in the event of an injury resulting from an accident which occurs as a result of or in the course of a worker's employment

1. Wage
2. Advancement
3. I.R.S.
4. Profit sharing
5. Fringe benefits
6. F.I.C.A.
7. Pension
8. Social Security Program
9. Overtime
10. Worker's compensation
11. Withholding taxes

TEST

2. Select legal aspects of employment by placing an "X" in the appropriate blanks.

    _____a. Maximum hours

    _____b. Paid sick leave

    _____c. Employment of minors

    _____d. Minimum wage

    _____e. Profit sharing

    _____f. Withholding tax

    _____g. Social Security

    _____h. Worker's compensation

3. Complete the following list of statements concerning payroll check deductions.

    a. Federal and state income tax — Calculated by a formula using the withholding allowances from an employee's ____________________

    b. ____________________ tax (FICA) — Employer and employee match contributions which represent 7% of the total wages paid

    c. Federal unemployment tax — Is paid by the ____________________ and finances unemployment insurance

    d. ____________________ — Benefits offered by an employer which may be deducted from an employee's paycheck

4. Select true statements concerning the method of obtaining a Social Security card by placing an "X" in the appropriate blanks.

    _____a. Apply for a Social Security card at any Social Security office or pick up an application form at post office

    _____b. Apply for the card at least two days prior to starting your first job

    _____c. Provide evidence of your age, identity, citizenship, or immigrant status

5. List three benefits paid from Social Security.

    a. ____

    b. ____

    c. ____

TEST

6. Select true statements concerning features of worker's compensation insurance by placing an "X" in the appropriate blanks.

   _____a. Cost is paid by employer

   _____b. Employer may purchase insurance from a private company or state owned fund

   _____c. Injuries which occur on or off the job are covered

   _____d. Treatment for an injury or occupational disease is covered

   _____e. Compensation benefits are provided if more than three days of work are missed

   _____f. Compensation benefits are provided only for temporary disabilities

   _____g. In case of death, compensation benefits are no longer provided

7. Circle the words which best complete statements concerning characteristics of unemployment insurance.

   a. Unemployment insurance is supervised by a **(state, federal)**agency

   b. Costs of insurance is paid by **(employer, employee)**

   c. Benefits are paid if employment is terminated due to a layoff or **(resignation, firing)**

   d. **(Length, Size)** of benefits depends on wages earned by individual and the state employed in

   e. Length of benefits **(will, will not)** vary from state to state

8. List six fringe benefits that employers may offer.

   a. ____

   b. ____

   c. ____

   d. ____

   e. ____

   f. ____

TEST

(NOTE: If the following activity has not been accomplished prior to the test, ask your instructor when it should be completed.)

9. Figure take-home pay.

WAGES, TAXES, AND FRINGE BENEFITS
UNIT III

ANSWERS TO TEST

1. a. 5
   b. 8
   c. 2
   d. 6
   e. 7
   f. 9
   g. 1
   h. 4
   i. 3
   j. 11
   k. 10

2. a, c, d, f, g, h

3. a. Form W-4
   b. Social Security
   c. Employer
   d. Optional deductions

4. a, c

5. a. Retirement benefits
   b. Death benefits
   c. Disability benefits

6. b, d, e

7. a. State
   b. Employer
   c. Firing
   d. Size
   e. Will

8. Any six of the following:

   a. Life and health insurance
   b. Credit unions
   c. Paid annual leave
   d. Paid sick leave
   e. Profit sharing
   f. Bonuses
   g. Pension plans
   h. Paid education
   i. Advancement
   j. Pleasant working conditions
   k. Employee discounts
   l. Job expense reimbursement
   m. Clothing allowance
   n. Travel expense reimbursement

9. Evaluated to the satisfaction of the instructor

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS

UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to select characteristics of a desirable personality, list expectations of an employer and employee, and select ways to get along with the public. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to human relations with their correct definitions.
2. List four reasons why we study personality.
3. Arrange in order the steps for changing personality.
4. Select characteristics of a desirable personality.
5. Complete a list of statements concerning characteristics of a desirable fellow worker.
6. Match undesirable personality traits with their correct meanings.
7. Select reasons why people work.
8. List three ways people are different.
9. Select ways to get along with people.
10. List expectations of an employer.
11. Complete a list of expectations of an employee.
12. Select ways to get along with the public.
13. Answer questions concerning human relations with fellow workers.

OBJECTIVE SHEET

14. Rate grooming and wardrobe habits.
15. Rate personality.
16. Develop a personality self-improvement plan.

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Discuss unit and specific objectives.

IV. Discuss information and assignment sheets.

V. Have students interview several employers and find out what personality traits would be desirable for their business.

VI. Have students write case studies about difficult human relations situations they have encountered and then share with class.

VII. Discuss grooming and wardrobe habits appropriate for employment. This would be an ideal time for students to put on a skit to demonstrate proper business attire as opposed to casual wear.

VIII. Invite a guest speaker to talk to the class on human relations in business.

IX. Use information collected in Assignment Sheet #1 to help place students in occupations which are compatible with their personality traits.

X. Have students complete Assignment Sheet #3, and then discuss their ratings with them on an individual basis. Help those students who received a low rating develop a self-improvement plan to change their negative traits into positive traits (Assignment Sheet #4).

XI. Arrange for class to listen to short motivational speeches.

Examples: Dale Carnegie, Zig Ziglar, Art Linkletter, Earl Nightingale

XII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Assignment sheets

    1. Assignment Sheet #1 — Answer Questions Concerning Human Relations with Fellow Workers

INSTRUCTIONAL MATERIALS

2. Assignment Sheet #2 — Rate Grooming and Wardrobe Habits
3. Assignment Sheet #3 — Rate Personality
4. Assignment Sheet #4 — Develop a Personality Self-Improvement Plan (Optional)

D. Answers to assignment sheets

E. Test

F. Answers to test

II. References:

A. *Human Relations in Agricultural Business, Student Manual.* Columbus, OH: Agricultural Education Curriculum Materials Service, Ohio State University, 1976.

B. *An Introduction to Agricultural Business and Industry, Student Manual.* Danville, IL: Interstate Printers, 1971.

C. *Job Application.* Columbia, MO: Instructional Materials Laboratory, University of Missouri, 1973.

D. Carlile, Robert. *Agriculture Sales and Service.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

III. Additional reference — Career Aids, Inc., 8950 Lurline Avenue, Dept. TE, Chatsworth, CA 91311.

(NOTE: A catalog entitled *Multimedia Materials for Occupational, Vocational, and Career Education,* may be obtained by writing to the address above.)

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

INFORMATION SHEET

I. **Terms and definitions**

   A. Attitude — A feeling or emotion toward a person or thing

   B. Egotism — The practice of talking about oneself too much; an exaggerated sense of self-importance

   C. Exploit — To make unethical use of another person for one's own advantage

   D. Human relations — A study of human problems designed to develop better interpersonal relationships

   E. Initiative — Ability to take action independently without outside influence or control

   F. Integrity — Fairness of conduct; firm adherence to a code of high moral conduct

   G. Peer pressure — The psychological need to be accepted by others in one's own age group or by others of one's own social or vocational status

   H. Personality — The sum of all specific traits that are consistently observable in an individual's behavior

   I. Tact — Knowing what to do or say in a given situation to avoid offending others; maintaining good relations with others

   J. Trait — A distinguishing quality or characteristic that contributes to personality

II. **Reasons why we study personality**

   (NOTE: Within every group there are leaders and followers. You must decide which you will be and learn how to work with others.)

   A. To understand ourselves

   B. To understand others

   C. To better live in our society

   D. To improve our personality

III. **Steps for changing personality**

   A. Decide that personality can be improved

   B. Find out how personality rates

INFORMATION SHEET

- C. Analyze this rating trait by trait
- D. Develop a plan of action and self-discipline
- E. Work on the plan of action

IV. **Characteristics of a desirable personality**

- A. Cheerfulness; sense of humor
- B. Friendliness
- C. Assertiveness
- D. Self-confidence
- E. Tactfulness
- F. Tolerance

V. **Characteristics of a desirable fellow worker**

- A. Adheres to business rules and policies
- B. Respects authority
- C. Carries out assigned responsibilities
- D. Is willing to put forth more than minimal effort
- E. Shows interest by being alert
- F. Shows admiration and appreciation
- G. Makes good use of constructive criticism
- H. Contributes new ideas
- I. Is honest
- J. Exhibits even temperament and good disposition
- K. Has good physical and mental health

INFORMATION SHEET

VI. **Undesirable personality traits and their meanings**

A. Politicking — Exploiting others for personal gain

B. Passing the buck — Dodging responsibility or blame by suggesting that persons in higher positions should make a decision or answer for a fault

C. Apple-polishing — Extending attention or service to one in a higher position with the hope of personal gain

D. Clique forming — Getting with the "in" crowd because of peer group pressure or for the sake of personal gain

E. Gossiping — Repeating rumors or distorted information about a person, a situation, or an ethnic group

VII. **Reasons why people work**

A. Satisfaction

B. Ability to support self and family

C. Acceptance of peers

D. Power

E. Wealth

F. Goal achievement

VIII. **Ways people are different**

A. Backgrounds

B. Attitudes

C. Abilities

(NOTE: Remember that no two people are alike; each person is an individual.)

IX. **Ways to get along with people**

A. Watch what you say; always say less than you think

(NOTE: How you say it often counts far more than what you say.)

B. Make promises sparingly and keep them faithfully, no matter what it costs

INFORMATION SHEET

C. Never let an opportunity pass to say a kind and encouraging thing to or about somebody

(NOTE: Praise good work done, regardless of who did it. If criticism is merited, criticize constructively, never spitefully.)

D. Be interested in others

(NOTE: Be interested in their pursuits, their welfare, their homes, and families. Let everyone you meet feel that you regard them as a person of importance.)

E. Be cheerful

(NOTE: Keep the corners of your mouth turned up. Hide your pains, worries, and disappointments under a pleasant smile. Laugh at good stories and learn to tell them.)

F. Retain an open mind on all debatable questions

(NOTE: Discuss but don't argue. It is a mark of superior minds to disagree and yet be friendly.)

G. Let your virtues speak for themselves, and refuse to talk of another's vices

(NOTE: Discourage gossip, and make it a rule to say nothing of another unless it is something good.)

H. Be careful of others' feelings

(NOTE: Wit and humor at the other fellow's expense are rarely worth the effort, and may hurt where they are least expected.)

I. Pay no attention to ill-natured remarks about you

(NOTE: Simply live so nobody will believe them.)

J. Don't be too anxious about getting praise

(NOTE: Do your work, be patient, forget self, and you will be respected and rewarded.)

X. Expectations of an employer

A. Loyalty

B. Dependability

INFORMATION SHEET

- C. Proper use of ability and willingness to follow directions
- D. Cooperation

  (NOTE: Accept changes in your job and be willing to learn new ideas.)
- E. Good working relationships

  (NOTE: Be willing to get along with others.)
- F. Good working habits

  (NOTE: Report to work on time, be ready to work, and work while there.)
- G. Honesty

XI. Expectations of an employee

- A. Money
- B. Recognition of accomplishment
- C. Job security
- D. Pleasant and safe working conditions

XII. Ways to get along with the public

- A. Be courteous
- B. Be tactful
- C. Be sincere
- D. Be helpful
- E. Be tolerant
- F. Be cheerful

  (NOTE: The agribusiness employee's primary responsibility is pleasing the customer. Manner, dress, attitude, speech, and performance must make a positive contribution to the operation.)

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

ASSIGNMENT SHEET #1 — ANSWER QUESTIONS CONCERNING HUMAN RELATIONS WITH FELLOW WORKERS

Directions: Choose the answer which is MOST correct for each of the following questions. Place your selection in the blank at the left of each number. Briefly explain your answers.

______1. Many occupations deal primarily with machines, equipment, or paper work; that is, they deal with things. In business, however, most of the jobs involve close contact with:

a. employers
b. supervisors
c. people
d. other workers

____

____

______2. As a group, people are very much:

a. different
b. alike
c. it is difficult to say

____

____

______3. It is possible that the things which you enjoy may:

a. appeal to others
b. not appeal to others
c. be distasteful to others
d. all of the above

____

____

ASSIGNMENT SHEET #1

_____4. Which of the following do most people have in common?

a. right to work at a job of their choice
b. desire to get ahead
c. desire to be accepted and approved
d. all of these
e. none of these

____

____

_____5. The best way to achieve your goals in life is to follow your rights and desires and:

a. also the wish of your boss
b. what your parents say
c. the Golden Rule
d. just what you feel like doing

____

____

_____6. Do the best you can for the important jobs and:

a. don't worry about the little jobs
b. let others do the little jobs
c. also do the most routine jobs well
d. everything else will take care of itself

____

____

_____7. Plus doing the best work you can, it is important to:

a. learn as much as you can about your company
b. see what you can get on your boss
c. keep up on the latest gossip
d. be seen and not heard

____

____

ASSIGNMENT SHEET #1

_____8. The right to think and act as individuals __________ normally shared by most.

a. is not
b. may be
c. is

____

____

_____9. The statement that "retailing is people" is:

a. not true
b. only partly true
c. all true

____

____

_____10. Which of the following is not a desirable trait of an employee?

a. sense of humor
b. tact
c. indifference
d. initiative

____

____

_____11. Exploiting others toward our own efforts is:

a. desirable
b. OK if you can get away with it
c. undesirable
d. not too bad

____

____

ASSIGNMENT SHEET #1

_____12. When you are criticized by your superior, it is best to:

a. act indifferent
b. tell him/her to do it himself/herself
c. take it constructively
d. shrug it off

_____13. The worker should be loyal:

a. during working hours only
b. both the time to and from work
c. all the time
d. only when you feel like it

_____14. To approach your job with enthusiasm, it is necessary to:

a. fool the boss
b. impress your co-workers
c. be glad to be part of the team

_____15. It is not necessary to be friendly as long as you:

a. do your job
b. act as though you are
c. get to work on time
d. none of these

ASSIGNMENT SHEET #1

_____16. When you have a question, it is best to:

a. do the job the way you think it should be done
b. wait and ask it later
c. not bother your boss with it
d. ask it when it needs to be asked

____

____

_____17. When you have joined a clique, you have:

a. picked sides
b. helped yourself
c. joined the "in" group
d. become a member of the team

____

____

_____18. A good way to get along in your new job is to:

a. be a "know-it-all"
b. be willing to learn
c. show your co-workers how smart you are
d. run to your boss with every question you have

____

____

_____19. Showing that you are not afraid of work means to:

a. work as hard as you can
b. be willing to tackle any job assigned
c. work harder than any of your co-workers

____

____

ASSIGNMENT SHEET #1

_____20. The need to show appreciation to fellow workers:

a. will get you nowhere
b. is strongest when you are new
c. isn't really necessary at all
d. is just on the surface

_____21. You should start calling your co-workers by their:

a. first names as soon as possible
b. nicknames to show you are really in
c. last name only
d. proper names until you have been around awhile or are told differently

_____22. If you do all of the things we have suggested, you will have:

a. everyone liking you
b. a few friends
c. a better chance of being well-liked
d. the reputation of being an apple-polisher

_____23. The people you learn the most from are:

a. always your bosses
b. your best buddies
c. those who show an interest in you
d. the ones you eat lunch with

ASSIGNMENT SHEET #1

_____24. Human behavior is usually:

a. pretty easy to understand
b. not too predictable
c. easy to predict
d. none of your business

____

____

_____25. The total morale of your business is:

a. beyond your control
b. a matter for the boss
c. each employee's problem
d. unimportant

____

____

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

ASSIGNMENT SHEET #2 — RATE GROOMING AND WARDROBE HABITS

Directions: Rate yourself on each of the following questions by placing an "X" in the appropriate blanks. Use the scale of 6-Always, 4-Usually, 2-Occasionally, and 0-Never. When a question refers specifically to the opposite sex, (it is not applicable), score it as 6. When you have completed the evaluation, total your score and compare to the rating scale provided.

QUESTIONS	RATING			
	Always 6	Usually 4	Occasionally 2	Never 0
1. Do you take a bath or shower daily?				
2. Do you use an effective deodorant or antiperspirant daily?				
3. Do you shave as often as needed?				
4. Do you clean your face thoroughly at least twice a day (more often if you have oily skin?)				
5. Do you completely remove makeup before bedtime?				
6. Do you check fingernails daily and repair or clean as necessary?				
7. Do you wash hair twice weekly (more often if needed)?				
8. Do you have hair cut or trimmed regularly?				
9. Do you use a dandruff shampoo and/or creme rinses and conditioners if needed?				
10. Do you brush your teeth at least twice daily?				
11. Do you use a mouthwash daily?				

ASSIGNMENT SHEET #2

	RATING			
QUESTIONS	Always 6	Usually 4	Occasionally 2	Never 0
12. Do you make the daily effort to apply makeup so that it looks fresh and natural?				
13. Do you get enough sleep and rest so that you feel refreshed?				
14. Do you put on clean hosiery and undergarments daily?				
15. Are your clothes clean and pressed?				
16. Do your clothes coordinate attractively?				
17. Do you check garments for split seams, ripped hems, or loose buttons before wearing?				
18. Do you take a good look at yourself in a full-length mirror before leaving the house?				
19. Do you take a few minutes during the day to freshen your makeup and comb your hair?				

TOTAL____

RATING

100-114 — Great, you take pride in your appearance

84-99 — Good, you'd probably pass inspection

70-84 — Fair, you're not really trying

Less than 70 — Poor, your best friend won't even tell you

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

ASSIGNMENT SHEET #3 — RATE PERSONALITY

Directions: Rate yourself on each of the following traits by placing an "X" in the column which best describes you. Total the points and compare with the scores below.

(NOTE: Be as sincere as possible when completing this assignment sheet so that you may determine your strong traits and pinpoint areas of your personality that may need improvement.)

TRAIT	VERY GOOD (4 pts.)	ABOVE AVERAGE (3 pts.)	AVERAGE (2 pts.)	BELOW AVERAGE (1 pt.)	POOR (0 pts.)
1. Facial expression					
2. Grooming and wardrobe habits					
3. Mannerisms					
4. Speech					
5. Bodily movements					
6. Intelligence					
7. Initiative					
8. Dependability					
9. Enthusiasm					
10. Sincere interest in others					
11. Honesty					
12. Courtesy					
13. Manners					
14. Respect for others					
15. Emotional control					

ASSIGNMENT SHEET #3

TRAIT	VERY GOOD (4 pts.)	ABOVE AVERAGE (3 pts.)	AVERAGE (2 pts.)	BELOW AVERAGE (1 pt.)	POOR (0 pts.)
16. Self-confidence	_____	_____	_____	_____	_____
17. Integrity	_____	_____	_____	_____	_____
18. Loyalty	_____	_____	_____	_____	_____
19. Desire to work	_____	_____	_____	_____	_____
20. Acceptance of change	_____	_____	_____	_____	_____
21. Ability to decide	_____	_____	_____	_____	_____
22. Ability to accept criticism	_____	_____	_____	_____	_____
23. Tact	_____	_____	_____	_____	_____
24. Cheerfulness	_____	_____	_____	_____	_____
25. Alertness	_____	_____	_____	_____	_____

Total __________

SCORING

92-100 — Very good, you have a great personality

85-91 — Good, you are a very likable person

75-84 — Average, you're not really trying but you get by

65-74 — Below average, you have room for improvement and need to concentrate on your weak traits

Less than 65 — Poor, you should visit with your instructor and develop a self-improvement plan to change your negative traits into positive traits

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

ASSIGNMENT SHEET #4 — DEVELOP A PERSONALITY SELF-IMPROVEMENT PLAN

Directions: Answer questions 1-3, and develop a self-improvement plan to change negative personality traits to positive traits.

1. List the negative personality traits which were pinpointed in Assignment Sheet #3.

2. Briefly explain why you rated yourself negatively on these traits.

3. What do you admire about individuals who display these same traits in a positive manner?

ASSIGNMENT SHEET #4

4. Review the answers given above and briefly state your plan of action to improve your negative traits.

   Example: If facial expression is a negative trait, the plan of action might be to smile more often to keep from frowning or scowling

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1 — A good discussion is more important than 100 on the quiz.

1. d There is contact with all of these groups but the close contact is with other workers
2. b This is a generalization but all people like to be treated with respect, considered important, and treated fairly; there are many individual differences within the group
3. d All three of these apply — it could be any of these
4. d
5. c Do unto others as you would have them do unto you
6. c
7. a
8. c
9. b To be successful, the employee needs to know about the products, services, etc.
10. c
11. c Explain what exploiting means
12. c
13. c
14. c
15. d
16. d
17. a
18. b
19. b
20. b
21. d This is part of respect

ANSWERS TO ASSIGNMENT SHEETS

22. c

23. c

24. a

25. c

Assignment Sheet #2 — Evaluated to the satisfaction of the instructor

Assignment Sheet #3 — Evaluated to the satisfaction of the instructor

Assignment Sheet #4 — Evaluated to the satisfaction of the instructor

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

______a. A distinguishing quality or characteristic that contributes to personality

______b. The sum of all specific traits that are consistently observable in an individual's behavior

______c. To make unethical use of another person for one's own advantage

______d. The psychological need to be accepted by others in one's own age group or by others of one's own social or vocational status

______e. A study of human problems designed to develop better interpersonal relationships

______f. The practice of talking about oneself too much; an exaggerated sense of self-importance

______g. A feeling or emotion toward a person or thing

______h. Knowing what to do or say in a given situation to avoid offending others; maintaining good relations with others

______i. Fairness of conduct; firm adherence to a code of high moral conduct

______j. Ability to take action independently without outside influence or control

1. Exploit
2. Peer pressure
3. Trait
4. Personality
5. Attitude
6. Human relations
7. Egotism
8. Initiative
9. Tact
10. Integrity

2. List four reasons why we study personality.

a. ____

b. ____

TEST

c. ______________________________

d. ______________________________

3. Arrange in order the steps for changing personality by numbering from one to five.

   _____a. Analyze this rating trait by trait

   _____b. Decide that personality can be improved

   _____c. Work on the plan of action

   _____d. Find out how personality rates

   _____e. Develop a plan of action and self-discipline

4. Select characteristics of a desirable personality by placing an "X" in the appropriate blanks.

   _____a. Cheerfulness; sense of humor

   _____b. Spitefulness

   _____c. Self-confidence

   _____d. Tactfulness

   _____e. Egotism

   _____f. Assertiveness

5. Complete the following statements concerning characteristics of a desirable worker by placing either "Does" or "Does not" at the beginning of each sentence.

   a. ____________________ carry out assigned responsibilities

   b. ____________________ criticize or question policy

   c. ____________________ put forth only minimal effort

   d. ____________________ contribute new ideas

   e. ____________________ adhere to business rules and policies

   f. ____________________ respect authority

   g. ____________________ criticize new ideas

   h. ____________________ exhibit even temperament and good disposition

TEST

6. Match undesirable personality traits on the right with their correct meanings.

______a. Exploiting others for personal gain

______b. Dodging responsibility or blame by suggesting that persons in higher positions should make a decision or answer for a fault

______c. Extending attention or service to one in a higher position with the hope of personal gain

______d. Getting with the "in" crowd because of peer group pressure or for the sake of personal gain

______e. Repeating rumors or distorted information about a person, a situation, or an ethnic group

1. Clique forming
2. Politicking
3. Gossiping
4. Passing the buck
5. Apple-polishing

7. Select reasons why people work by placing an "X" in the appropriate blanks.

______a. Ability to support self and family

______b. Goal achievement

______c. Desire to pay taxes

______d. Acceptance of peers

______e. Decrease welfare rolls

8. List three ways people are different.

a. ________________________________

b. ________________________________

c. ________________________________

9. Select ways to get along with people by placing an "X" in the appropriate blanks.

______a. Be cheerful

______b. Complain often

______c. Talk about co-workers behind their backs

TEST

______d. Retain an open mind on all debatable questions

______e. Be careful of others' feelings

______f. Voice your opinions often

______g. Be interested in others

10. List four expectations of an employer.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

11. Complete the following list of expectations of an employee.

a. ______________________________

b. Recognition of accomplishment

c. Job security

d. ______________________________

12. Select ways to get along with the public by placing an "X" in the appropriate blanks.

______a. Be helpful

______b. Be tolerant

______c. Be tactful

______d. Treat the public as they treat you, no matter what the situation

______e. Be sincere

______f. Be courteous

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

13. Answer questions concerning human relations with fellow workers.

14. Rate grooming and wardrobe habits.

15. Rate personality.

16. Develop a personality self-improvement plan.

EMPLOYER/EMPLOYEE/CUSTOMER RELATIONS
UNIT I

ANSWERS TO TEST

1.
a.	3	f.	7
b.	4	g.	5
c.	1	h.	9
d.	2	i.	10
e.	6	j.	8

2. a. To understand ourselves
   b. To understand others
   c. To better live in our society
   d. To improve our personality

3. a. 3
   b. 1
   c. 5
   d. 2
   e. 4

4. a, c, d, f

5.
a.	Does	e.	Does
b.	Does not	f.	Does
c.	Does not	g.	Does not
d.	Does	h.	Does

6. a. 2
   b. 4
   c. 5
   d. 1
   e. 3

7. a, b, d

8. a. Backgrounds
   b. Attitudes
   c. Abilities

9. a, d, e, g

ANSWERS TO TEST

10. Any four of the following:

    a. Loyalty
    b. Dependability
    c. Proper use of ability and willingness to follow directions
    d. Cooperation
    e. Good working relationships
    f. Good working habits
    g. Honesty

11. a. Money
    d. Pleasant and safe working conditions

12. a, b, c, e, f

13.-16. Evaluated to the satisfaction of the instructor

COMMUNICATION SKILLS
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to select factors necessary for effective communication and ways to achieve it, and select ways to carry on a casual conversation. The student should also be able to use proper telephone procedures. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to communication skills with their correct definitions.
2. List three types of communication.
3. Select factors necessary for effective communication.
4. Complete a list of statements concerning ways to achieve effective communication.
5. Circle the words which best complete statements concerning causes for failure in communication.
6. Match nonverbal communication signals with their meanings.
7. Select true statements concerning the proper way to introduce yourself.
8. Select true statements concerning ways to get more out of casual conversations.
9. Complete a list of general rules for proper telephone use.
10. Select true statements concerning other tips for proper telephone use.
11. Analyze voice quality.
12. Use proper telephone procedures.

COMMUNICATION SKILLS
UNIT II

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Have students introduce themselves to class and then discuss the effectiveness of their presentations.

VII. Provide recorder for Assignment Sheet #1.

VIII. Divide students into groups and have each group plan and present a short skit on one of the following areas:

  A. The effectiveness of body language as a type of communication

  B. Ways to achieve effective communication

  C. Proper ways to introduce yourself

  D. Ways to get more out of casual conversations

  E. General rules for proper telephone use

  (NOTE: Students should refer to the information sheet for assistance in planning their skit.)

IX. Request use of a film on how to answer a business phone properly and borrow a teletrainer from the local phone company for students to practice proper telephone use.

X. Obtain a video tape about the effectiveness of body language as a type of communication. If one is not available, have students role play various situations to show how body language is a nonverbal means of communication.

XI. Play a tape or show a short film and then test students on their ability to listen effectively. Discuss ways to improve their listening ability.

XII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Feedback

    2. TM 2 — Leaving Telephone Unattended

  D. Assignment sheets

    1. Assignment Sheet #1 — Analyze Voice Quality

    2. Assignment Sheet #2 — Use Proper Telephone Procedures

  E. Test

  F. Answers to test

II. References:

  A. Rowe, Kenneth L., and Hallie C. Jimerson. *Communications in Marketing.* Dallas: Gregg Division/McGraw-Hill Book Co., 1978.

  B. Hohhertz, Durwin. *Personal Development for Cooperative Part-Time Training.* Commerce, TX: Occupational Curriculum Laboratory, East Texas State University, 1981.

  C. Human Relations Curriculum. Stillwater OK: Mid-America Vocational Curriculum Consortium, 1983.

III. Additional references:

  A. Film. "Win More Friends by Telephone". American Telephone and Telegraph Company.

  B. Films. Bell Telephone Co. or the public phone company in your area.

  (NOTE: The following films are available to teachers in the state of Oklahoma by contacting their local Bell Telephone marketing/sales representative.)

    1. "I Rather Like You Mr. Bell"

    2. "If the Shoe Fits"

    3. "How to Lose Your Best Customer"

INSTRUCTIONAL MATERIALS

C. Career Aids, Inc., 8950 Lurline Avenue, Dept. TE, Chatsworth, CA 91311.

(NOTE: A catalog entitled *Multimedia Materials for Occupational, Vocational, and Career Education,* may be obtained by writing to the above address.)

D. Film series. "The Art of Communication". Photocom Productions, P.O. Box 3135, Pismo Beach, CA 93449.

E. Swindle, Robert. *The Business Communicator.* Englewood Cliffs, NJ: Prentice Hall, 1981.

COMMUNICATION SKILLS
UNIT II

INFORMATION SHEET

I. **Terms and definitions**

   A. Communication — Transfer of ideas, feelings, and attitudes by which meaning is conveyed from one person to another

   B. Empathy — Putting self in other person's position; participating in another person's feelings or ideas

   C. Feedback — Returning to the beginning source; finding out how one did

   D. Grapevine — Informal communication system that exists in all organizations; may be helpful or harmful depending on how it is used

   E. Memo — Written announcement sent to members within an organization

   F. Trade association journals — Publications printed by various non-profit organizations to disseminate information about an industry

   (NOTE: There are over 12,000 trade associations in the United States.)

II. **Types of communication**

   A. Oral

   B. Written

   C. Nonverbal

   (NOTE: Body language is a common form of nonverbal communication in which a message is sent by an individual's physical movements.)

III. **Factors necessary for effective communication**

   A. Feedback (Transparency 1)

   B. Trust in the person sending the message

   (NOTE: Real communication cannot take place if the person receiving the message feels threatened by the message or does not have confidence in the sender.)

   C. Empathy

   (NOTE: Most people have a tendency to judge a message from their own viewpoints.)

INFORMATION SHEET

D. Listening

(NOTE: Don't get so involved in thinking about your reply that you miss or confuse information; get the complete information first, and then quickly organize your thoughts and make your reply.)

E. Proper timing

(NOTE: Conversation cannot take place if the listener is interrupted, has his/her mind on other things, or if there is much interference in the background.)

IV. Ways to achieve effective communication

A. Encourage questions and participation

B. Use examples to illustrate main ideas

C. Use the kind of language the listener will understand

(NOTE: Simple words are usually best, but if you talk down to people, they will resent it; if you talk over people's heads, they become uncomfortable and suspicious.)

D. Respect the listener

E. Get to the point; do not talk too much

F. State clearly why orders are given or why certain standards or results are expected

G. Pay attention

H. Make allowances for those who may have something worthwhile to say but who lack the ability or experience to express themselves well

V. Causes for failure in communication (listening traps)

A. Lack of interest in what is being said

B. Becoming emotionally involved

C. Not listening for facts

D. Faking attention

E. Interrupting while others talk

F. Jumping to conclusions

INFORMATION SHEET

G. Talking "down" to the other person

Example: Don't act as if you know it all or that your opinion is the only right one

H. Concentrating interest on person rather than content

I. Lack of eye contact

VI. **Nonverbal communication signals**

(NOTE: Body language communicates an individual's subconscious as well as conscious feelings and may, at times, contradict verbal communication. Therefore, it is important to recognize what the individual is saying in the form of gestures, expressions, and stances.)

A. Negative gestures, expressions, and stances

1. Tapping fingers, cracking knuckles, wringing hands, tugging hair — lack of confidence, uneasiness, bored
2. Moving around in chair — restless
3. Shuffling papers — anxious
4. Playing with ring on finger — nervous, anxious
5. Side of head leaning on hand — bored
6. Raised eyebrows — surprise, doubt, indifference
7. Scowl — disapproval
8. Lips pressed tightly — anger, determination
9. Lower lip protruding — pouting, sulking
10. Raising shoulders casually — indifference
11. Closed fist — hostility, lack of acceptance
12. Shrugged shoulders — lack of ambition
13. Arms folded tightly high on chest — closed, defensive, disagreement, discomfort, withdrawing from conversation
14. Hands on sides of waist — anger, disgust
15. Shuffling feet — Lack of energy and ambition

INFORMATION SHEET

16. Turning head from side to side — disagreement

B. Positive gestures, expressions, and stances

1. Eye contact — attentive, listening
2. Smiling — pleasant
3. Open palms — open, friendly
4. Hand in one pocket — calm
5. Hands on hips — aggressive
6. Hands laying quietly on thighs or arms of chair — at ease
7. Hand stroking chin — thoughtful consideration
8. Hand on cheek — thinking, interested, attentive
9. Fingers tucked under belt — confident, cool
10. Sitting with feet flat on floor — poised
11. Coat unbuttoned — open, friendly
12. Sitting slightly forward in chair — attentive
13. Hands clasped behind back — thinking, listening, contemplating, concentrating, meditating
14. Head nodding up and down — agreement, support

VII. Proper way to introduce yourself

A. Introduce yourself promptly

B. Give first and last name

C. State name slowly and distinctly

D. Complete introduction by giving some information about yourself so new acquaintances may talk easily with you and remember you

Examples: "I'm Joe Smith, a student at Lincoln High School."

"I'm Joe Smith from Lincoln High School and I will be working as a stockroom clerk today."

INFORMATION SHEET

VIII. **Ways to get more out of casual conversations**

- A. Ask questions to discover the other person's interests

  Examples: Sports, family, job

- B. Avoid controversial subjects such as religion and politics
- C. Avoid repeating annoying words and phrases

  Examples: "And, uh. . ." and "You know"

- D. Do not monopolize the conversation

  (NOTE: A rule of thumb is not to talk more than one minute without giving someone else an opportunity to participate.)

- E. Be a good listener and people will think you are a great conversationalist
- F. Do not call older people by their first names unless they give permission
- G. Follow single word answers like "yes" and "no" with the person's name and a simple statement to make the reply sound friendly
- H. Say friendly phrases, such as "Good morning," automatically

  (NOTE: Such phrases, whether or not an answer is given, are appropriate in business.)

- I. Avoid using your hands too much while talking

IX. **General rules for proper telephone use** (Transparency 2)

(NOTE: Remember when you are on a business telephone, you represent the entire business.)

- A. Answer promptly
- B. When calling, allow the telephone to ring ten times or for one minute before hanging up
- C. Use a pleasant voice
  - 1. Visualize the person on the other end of the line
  - 2. Smile while you talk

    (NOTE: Smiling will cause your voice to sound familiar and less flat.)

INFORMATION SHEET

D. Address the other party

1. Make an introductory statement

2. State the business name

3. Identify yourself

4. Request action

Example: "Good morning, Smith's Feed and Seed, Debbie Smith, may I help you?"

E. Do not say "speaking" after your name because what is said last will be what the other party hears best

(NOTE: Be cautious about giving personal information or confidential information about the business to strangers.)

F. Use the individual's name often

G. Speak distinctly into the receiver

(NOTE: A telephone is made to pick up a normal pitch at about an inch from the mouth.)

H. Do not ask who is calling unless it is company policy

I. Ask "Will you hold or shall I call you back?" when you must leave to get information

(NOTE: If it becomes necessary to be away from phone for long periods of time, check back with caller frequently.)

J. Press the hold button on the phone to cut out noisy distractions if you have to leave the phone unattended; lay the receiver flat if the telephone does not have a hold button

(NOTE: A telephone receiver will pick up sound for 10 to 12 feet.)

K. If phone conversation has been interrupted, attract attention before resuming the call

Example: "Ms. Jones? Thank you for waiting."

X. **Other tips for intelligent telephone use**

A. Write down points to be covered and questions to be asked before placing a call, especially a long distance call

INFORMATION SHEET

B. State, "This is long distance," as soon as the party answers

(NOTE: Consequently, the party who answers should not keep you waiting for a long period.)

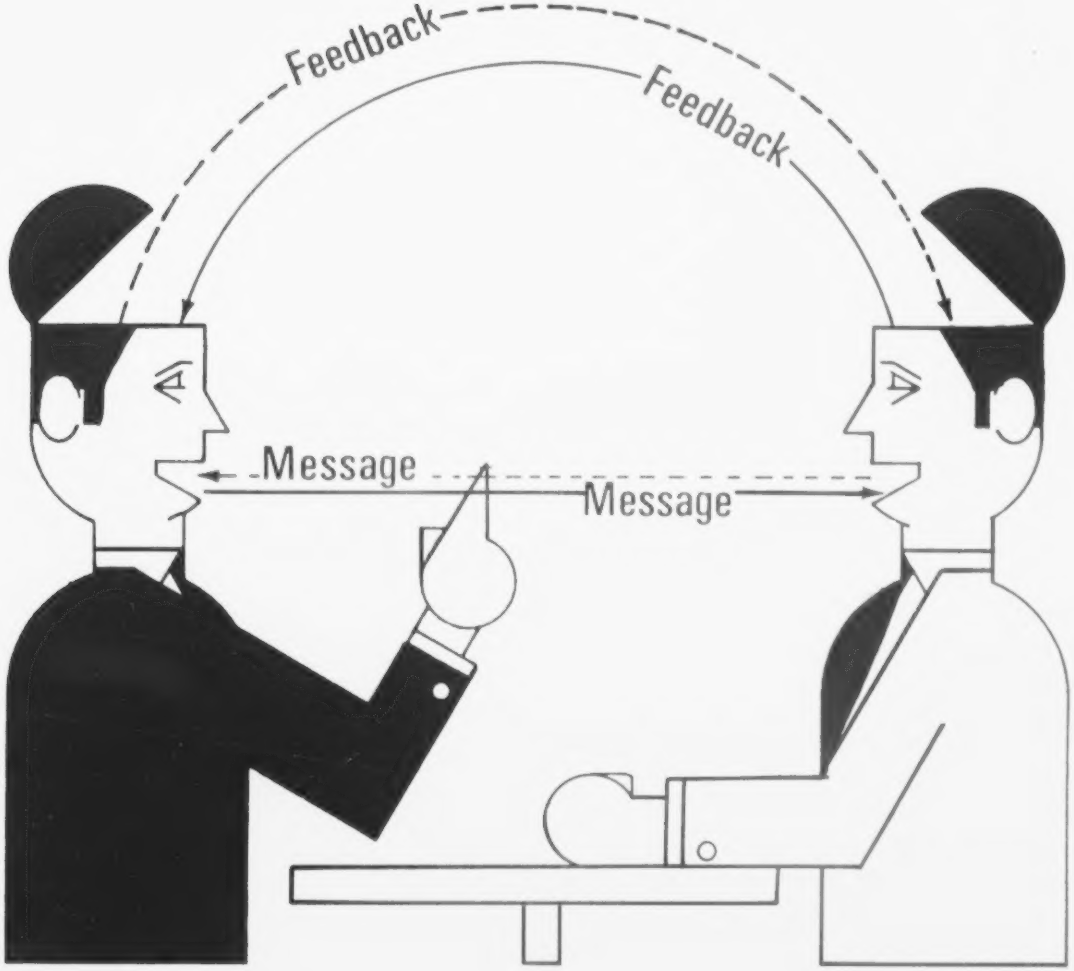
C. Replace the telephone receiver easily

(NOTE: The person making the call should hang up first.)

D. Have emergency and frequently called phone numbers near the phone

(NOTE: Many stores call their frequent and best customers prior to making a delivery run; this courtesy often brings additional sales and saves a lot of money on single-item deliveries.)

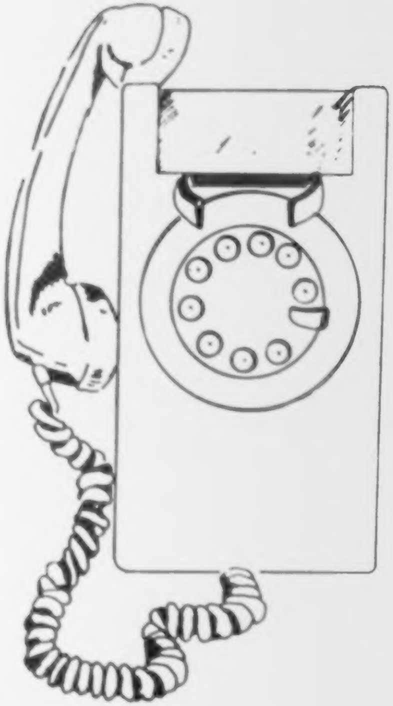
Feedback


Feedback
Feedback
Message
Message

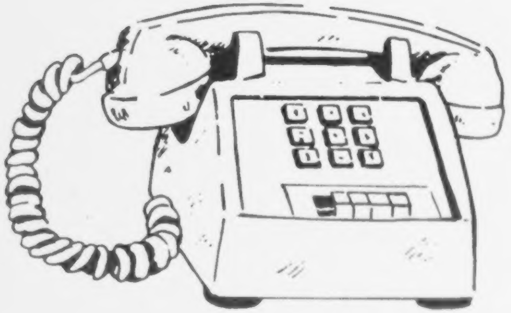
TM 1

EA-47-B

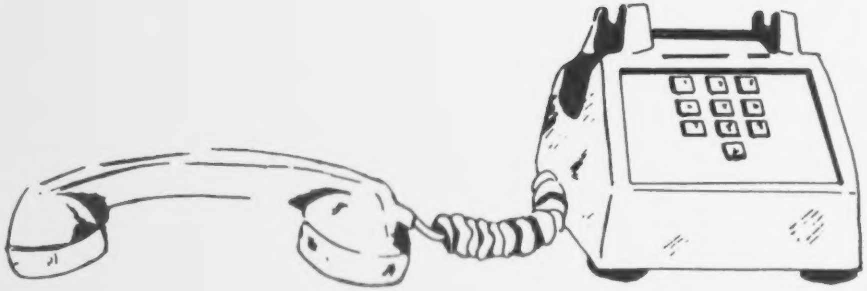
Leaving Telephone Unattended



Lay Receiver Against Side of Wall Telephone



Press Hold Button



Lay Receiver Flat

COMMUNICATION SKILLS
UNIT II

ASSIGNMENT SHEET #1 — ANALYZE VOICE QUALITY

Directions: Make a tape recording of your voice. Then, listen to the tape and complete the rating which follows. Using the rating of your voice on tape, prepare a list of ways in which you can improve your voice. Complete the list on a separate piece of paper.

Have your classmates rate your voice, too. Check back periodically to see if there has been any noticeable progress.

VOICE RATING

Place an "X" in the column which best answers the following questions. Total the points indicated in each column and compare with the scores below.

	Answer		
	Yes (4)	Maybe/Sometimes (2)	No (0)
1. Do you speak too loudly or in a noisy manner?			
2. Do people frequently ask you to repeat a statement you have made?			
3. Do you speak in the same tone continually?			
4. Do you speak with the same volume continually?			
5. Do you speak in an artificial, unnatural, and affected voice?			
6. Is your voice high pitched and shrill?			
7. Do you speak in long sentences which frequently lose their meaning?			
8. Do you hiss when using certain letters? (P, B, T, C, S)			

ASSIGNMENT SHEET #1

	Answer		
	Yes (4)	Maybe/Sometimes (2)	No (0)
9. Do you speak in mush tones as though you had something in your mouth?			
10. Do you use "uh" and "er-uh" frequently?			
11. Do you talk "through your nose"?			
12. Do you talk in a jerky manner?			
13. Do you talk in a whining and apologetic manner?			
14. Do you talk in a dominating dictatorial tone?			
15. Do you stammer and stutter?			
16. Do you often speak too fast or in a slow drawl?			
17. Do you mispronounce words frequently?			
18. Does your voice lose its force and expression at the end of sentences?			
19. Do you speak in a flat, dull, and colorless tone?			
20. Do you jumble up consonants, which make your speech hard to understand?			
21. Do you use a "gushy" or "gooey" voice when talking to friends?			
22. Do you choke off vowel sounds?			
23. Is your voice unpleasant when you laugh?			
24. Do you run words together?			

ASSIGNMENT SHEET #1

	Answer		
	Yes (4)	Maybe/Sometimes (2)	No (0)
25. Do you use colloquialisms or speak with an accent?			
26. Do you have an inadequate vocabulary?			
27. Is your voice unfriendly and cold?			
28. Do you have trouble emphasizing your main thought?			

Subtotals ________ ________ ________
Total ________

Scoring
0 to 10 — Excellent
10 to 20 — Good
20 to 30 — Fair
30 and above — Unsatisfactory; make improvements

COMMUNICATION SKILLS
UNIT II

ASSIGNMENT SHEET #2 — USE PROPER TELEPHONE PROCEDURES

Directions: Select one of the following situations to role-play on a mock telephone before the class. Demonstrate proper telephone use in handling the situation.

A. Your supervisor is talking on another phone when you receive a phone call requesting to speak to the supervisor

B. The caller requests information about servicing a product that is sold at the store where you work

C. The caller asks to speak to someone who works in the accounting department but everyone is out to lunch

D. The telephone rings while you are busy with a customer

E. The caller asks to speak to Larry Worker who is on vacation for the week

COMMUNICATION SKILLS
UNIT II

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. Putting self in other person's position; participating in another person's feelings or ideas

_____b. Transfer of ideas, feelings, and attitudes by which meaning is conveyed from one person to another

_____c. Publications printed by various non-profit organizations to disseminate information about an industry

_____d. Informal communication system that exists in all organizations; may be helpful or harmful depending on how it is used

_____e. Written announcement sent to members of an organization

_____f. Returning to the beginning source; finding out how one did

1. Communication
2. Empathy
3. Memo
4. Trade association journals
5. Feedback
6. Grapevine

2. List three types of communication.

a. ______________________________

b. ______________________________

c. ______________________________

TEST

3. Select factors necessary for effective communication by placing an "X" in the appropriate blanks.

______a. Impressing the listener

______b. Feedback

______c. Trust in the person sending the message

______d. Use of big words

______e. Saying only "yes" and "no" unless necessary to say more

______f. Listening

______g. Interrupting

______h. Proper timing

______i. Empathy

4. Complete the following list of statements concerning ways to achieve effective communication.

a. Encourage questions and ______________________________

b. Use ______________________________ to illustrate main ideas

c. Use the ______________________________ the listener will understand

d. ______________________________ the listener

e. Get to the point; do not ______________________________

f. State ______________________________ why orders are given or why certain standards or results are expected

g. Pay attention

h. Make allowances for those who may have something worthwhile to say but who lack the ability or experience to ______________________________

5. Circle the words which best complete the following statements concerning causes for failure in communication.

a. Lack of **(understanding, interest)** in what is being said

b. Becoming **(romantically, emotionally)** involved

TEST

c. **(Faking, Demanding)** attention

d. Concentrating interest on person rather than **(surroundings, content)**

e. Lack of eye **(appeal, contact)**

6. Match nonverbal communication signals on the right with their correct meanings.

______a. Pleasant
______b. Open, friendly
______c. Agreement, support
______d. Restless
______e. Nervous, anxious
______f. Lack of confidence, uneasiness, bored
______g. Hostility, lack of acceptance
______h. Aggressive
______i. Disapproval
______j. Anger, disgust
______k. Poised
______l. Attentive, listening
______m. Indifference
______n. Surprise, doubt
______o. Thinking, interested
______p. Bored

1. Scowl
2. Hands on side of waist
3. Eye contact
4. Closed fist
5. Hands on hips
6. Open palms
7. Playing with ring on finger
8. Moving around in chair
9. Head nodding up and down
10. Side of head leaning on hand
11. Smiling
12. Raised eyebrows
13. Sitting with feet flat on floor
14. Tapping fingers, cracking nuckles
15. Raising shoulders casually
16. Hand on cheek

TEST

7. Select true statements concerning the proper way to introduce yourself by placing an "X" in the appropriate blanks.

_____a. Introduce yourself promptly

_____b. Give first and last name

_____c. State name slowly and distinctly

_____d. Complete introduction by giving some information about yourself so new acquaintances may talk easily with you and remember you

8. Select true statements concerning ways to get more out of casual conversations by placing an "X" in the appropriate blanks.

_____a. Ask questions to discover the other person's interests

_____b. Talk about yourself a lot

_____c. Avoid controversial subjects such as religion and politics

_____d. Talk about your latest achievement

_____e. Do not monopolize the conversation

_____f. Be a good listener and people will think you are a great conversationalist

_____g. Discuss controversial subjects

_____h. Call all people by their first name

_____i. Say friendly phrases, such as "Good morning," automatically

_____j. Follow single word answers like "yes" and "no" with one person's name and a simple statement to make the reply sound friendly

9. Complete the following list of general rules for proper telephone use.

a. Answer ______________________________

b. When calling, allow the telephone to ring __________ times or for one minute before hanging up

c. Use a ______________________________ voice

d. Do not say "______________________________" after your name because what is said last will be what the other party hears best

TEST

e. Use the individual's name ______________________________

f. Speak ______________________________ into the receiver

g. Do not ask who is calling unless it is ______________________________

h. If a phone conversation has been interrupted, ______________________________ before resuming the call

10. Select true statements concerning other tips for proper telephone use by placing an "X" in the appropriate blanks.

_____a. Write down points to be covered and questions to be asked before placing a call, especially a long distance call

_____b. Do not waste time telling someone you're calling long distance

_____c. Replace the telephone receiver so that is makes enough noise to let the other party know the conversation is over

_____d. Have emergency and frequently called phone numbers near the phone

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

11. Analyze voice quality.

12. Use proper telephone procedures.

COMMUNICATION SKILLS
UNIT II

ANSWERS TO TEST

1.

a.	2	d.	6
b.	1	e.	3
c.	4	f.	5

2. a. Oral
   b. Written
   c. Nonverbal

3. b, c, f, h, i

4. a. Participation
   b. Examples
   c. Kind of language
   d. Respect
   e. Talk too much
   f. Clearly
   h. Express themselves well

5. a. Interest
   b. Emotionally
   c. Faking
   d. Content
   e. Contact

6.

a.	11	i.	1
b.	6	j.	2
c.	9	k.	13
d.	8	l.	3
e.	7	m.	15
f.	14	n.	12
g.	4	o.	16
h.	5	p.	10

7. All are correct

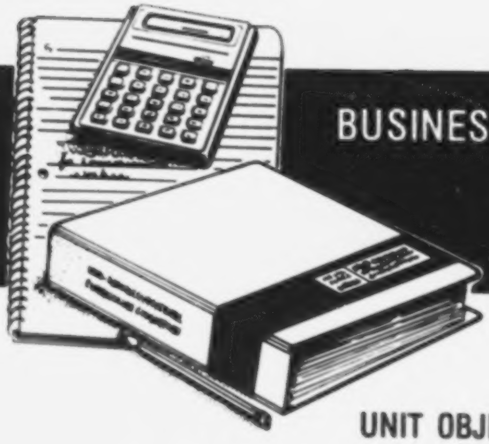
8. a, c, e, f, i, j

9. a. Promptly
   b. Ten
   c. Pleasant
   d. Speaking
   e. Often
   f. Distinctly
   g. Company policy
   h. Attract attention

ANSWERS TO TEST

10. a, d

11. and 12. Evaluated to the satisfaction of the instructor



BUSINESS ORGANIZATIONS
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to match types of business organizations with their characteristics and complete a business structure worksheet. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheet and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to business organizations with their correct definitions.
2. Match types of business organizations with their characteristics.
3. Match types of cooperative corporations with their characteristics.
4. Select true statements concerning common types of organizational patterns.
5. Complete a business structure worksheet.

BUSINESS ORGANIZATIONS
UNIT I

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Have students develop a list of areas where cooperatives have been formed.

VII. Invite a representative of a local cooperative to discuss their organizational structure and characteristics.

VIII. Take students on a field trip to visit an agribusiness which operates under private ownership and one which operates under a partnership.

IX. Have students divide into three groups with each group representing a type of cooperative corporation. Then, have them select an organizational pattern and outline what their cooperative will offer.

X. Survey businesses in the community to determine types of organizational patterns being used.

XI. Use case studies to determine the most effective type of organizational pattern.

XII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

    A. Objective sheet

    B. Information sheet

    C. Transparency masters

        1. TM 1 — The Wheel Pattern

        2. TM 2 — The Line or Military Pattern

INSTRUCTIONAL MATERIALS

3. TM 3 — The Staff Pattern

D. Assignment Sheet #1 — Complete a Business Structure Worksheet

E. Answers to assignment sheet

F. Test

G. Answers to test

II. References:

A. Carlile, Robert. *Agriculture Sales and Service*. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

B. United States Department of Agriculture. *Advising People About Cooperatives*. Washington: Government Printing Office, 1976.

C. United States Department of Agriculture. *How to Start a Cooperative*. Washington: Government Printing Office, 1977.

D. United States Department of Agriculture. *Opportunities in the Co-op Business World: A Leader's Program for Youth*. Washington: Government Printing Office, 1975.

III. Additional references:

A. Educational Department, Farmland Industries. P.O. Box 7305, Dept. 169, Kansas City, MO 64116.

(NOTE: Farmland Industries has films and educational games to help students learn about business organizations and the various methods of doing business.)

B. Farmer Cooperative Service, U.S. Department of Agriculture, Washington, D.C. 20250.

C. American Institute of Cooperation, Suite 504, 1129 20th St., N.W., Washington, D.C. 20036.

BUSINESS ORGANIZATIONS
UNIT I

INFORMATION SHEET

I. **Terms and definitions**

A. Capital — Net worth; accumulated possessions calculated to bring in income

B. Cooperative — Voluntary contractual organization of persons having a mutual ownership interest in providing themselves a needed service on a non-profit basis

C. Corporation — A body formed and authorized by law to act as a single person although constituted by more than one person and legally endowed with various rights and duties

D. Dividend — A share in profits based on the amount of stock owned by an individual

(NOTE: Dividends may be distributed in the form of additional stock shares or a sum of money.)

E. Organization — An administrative and functional structure such as a cooperative or corporation

F. Partnership — A legal relationship existing between two or more persons contractually associated as joint principals in a business

G. Share — Any of the equal interests or rights into which the entire stock of a corporation is divided and ownership is evidenced by one or more certificates

H. Stockholder — A person owning one or more shares in a business

II. **Types of business organizations and their characteristics**

A. Private ownership (sole proprietor)

1. Business is owned by one person
2. All decisions and policies are made by the owner
3. Profits are enjoyed by the owner
4. Responsibility to supply the necessary capital rests with the owner
5. Liability of the business rests upon the owner

INFORMATION SHEET

B. Partnership

1. Business is owned by the individuals, who share in ownership and management
2. Two or more people are able to invest more capital jointly in a business venture
3. Profits or losses are shared by the owners
4. In case of business failure, all partners may be liable to the extent of their partnership

C. Investor-oriented corporation

1. Business that requires more capital than one or two people have to invest; many people are given the opportunity to invest in the company in smaller amounts
2. Ownership is by shares of stock
3. Business is operated and policy is determined by an elected board of directors

   (NOTE: This board employs a president, secretary, treasurer and officers to manage the business.)
4. Capital for the business comes from the sale of stock and from returns from goods and services provided
5. Voting by stockholders and dividends paid to the stockholders are in proportion to their ownership
6. Services and goods provided by a regular business corporation are, for the most part, not primarily for the stockholders but are for the general public
7. In a business failure, the corporation is liable to the full extent of its assets

   (NOTE: Each stockholder, however, cannot lose more than the amount invested in stock.)
8. There is a heavy taxation

   (NOTE: The profits of the corporation are taxed and the remaining profits are distributed to the stockholders in the form of dividends. There may be a tax advantage in different types of corporations.)

INFORMATION SHEET

D. Cooperative corporation

1. Formed mainly for the members with whom to do business
2. Formed primarily to serve its members
3. Basic policy is determined at general meetings open to all the members
4. Members elect a board of directors who make the policy decisions
5. Each member has one vote, regardless of shares of stock that the member owns or the volume of business the member has had with the cooperative

   (NOTE: Some cooperatives' by-laws, where state law permits, provide for additional votes per member based on the previous years patronage.)

6. Excess net margin from the business is returned to members (owners) as patronage refunds
7. Members pay the tax on the earnings of the company

III. **Types of cooperative corporations and their characteristics**

A. Marketing cooperatives

Examples: Sunkist, Land-O-Lakes, Associated Milk Producers (AMPI)

1. Provide a variety of off-farm processing and marketing services
2. Help producers to grow and process quality farm products to market specifications
3. Enable members to extend control of their products through the processing and marketing channels

   (NOTE: Bargaining cooperatives are formed by the producers to establish common quality, common price, and set rules on their product. Bargaining cooperatives do not take possession of the product or assemble, process, or distribute them.)

INFORMATION SHEET

B. Purchasing cooperatives

Examples: Farmland Industries (Co-op), Mid-Continent Farms Association (MFA), Farm Bureau

1. Provide supplies for members
2. Buy supplies in quantity and pass savings on to the members
3. Manufacture and distribute supplies to provide an even greater savings to members
4. May perform both marketing and purchasing functions

C. Service cooperatives

1. Provide specialized services in areas such as livestock breeding, irrigation, farm machinery, pest control management, financial services and utilities
   a. Rural electric cooperatives
   b. Rural water districts
   c. Telephone cooperatives
2. Provide farm credit service
   a. Production Credit Association
   b. Federal Land Bank
   c. Bank of cooperatives

IV. **Common types of organizational patterns**

A. Wheel pattern (Transparency 1)

1. Common in small businesses with only one owner and several employees, also in other types of small businesses such as partnerships
2. The authority is concentrated in one person
3. Because of the small number of employees in the business, each may perform several different functions

INFORMATION SHEET

B. Line or military pattern (Transparency 2)

   1. Each employee (except for the lowest rank) supervises one or more employees

   2. Each employee is responsible to only one supervisor

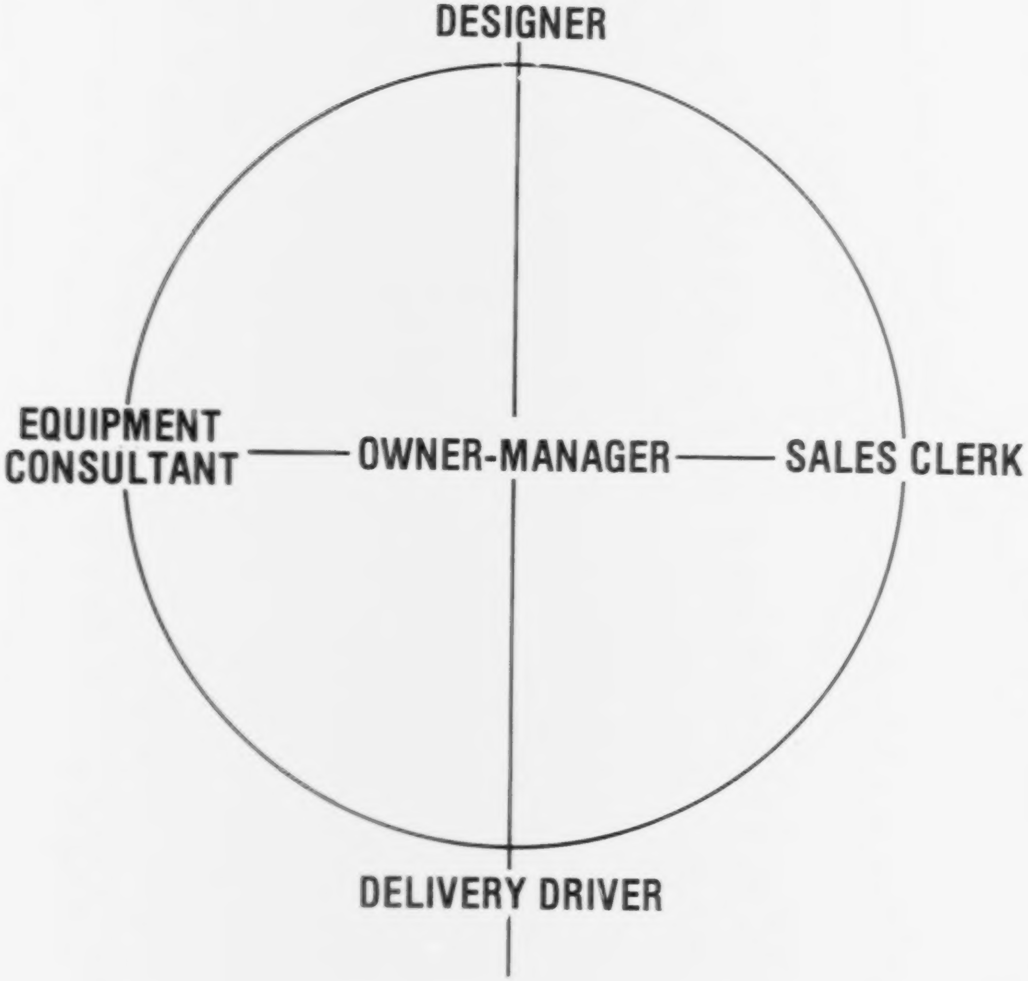
   3. Manager is responsible to the owners or the board of directors

C. Staff pattern (Transparency 3)

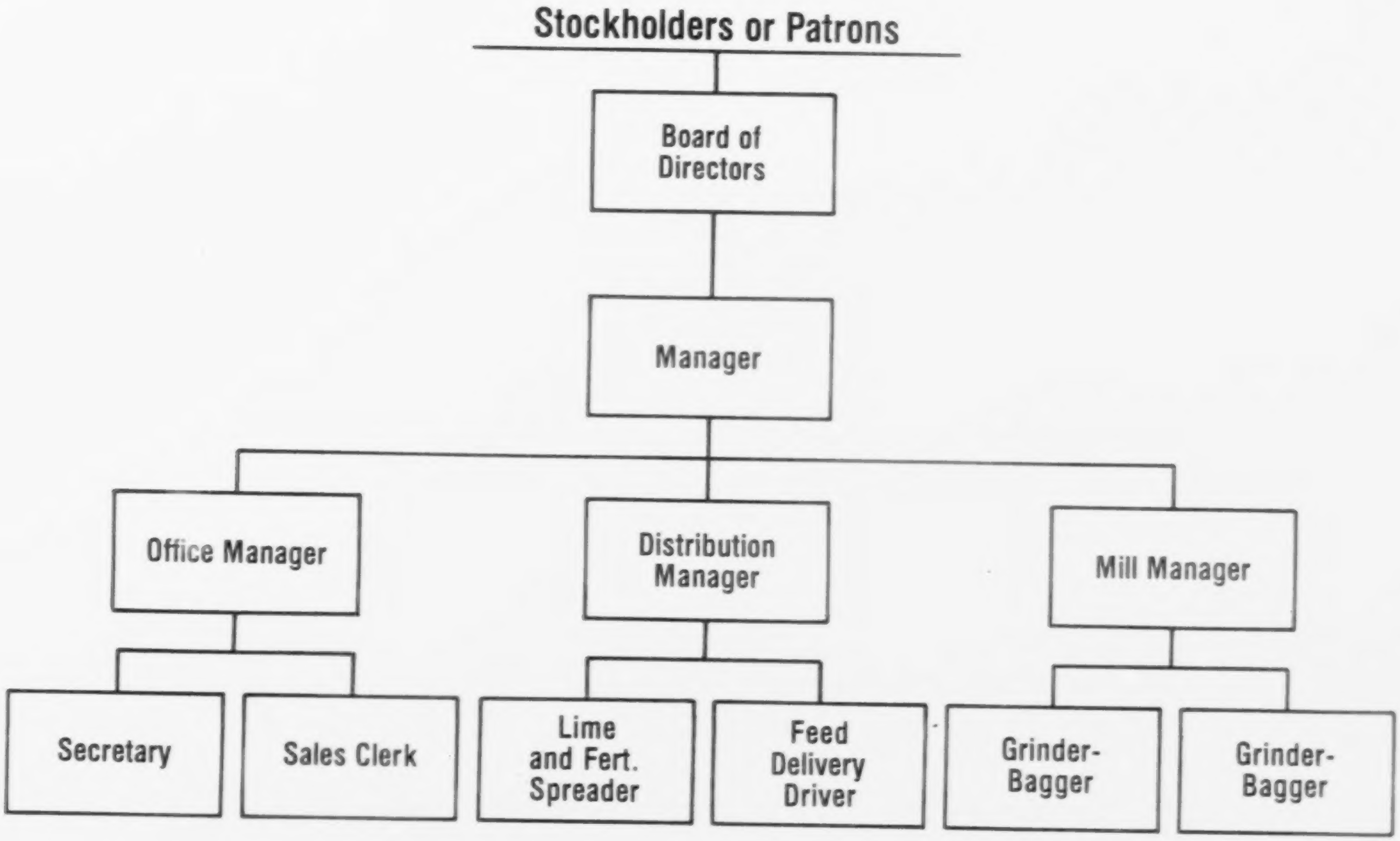
   1. Staff employee is frequently called an administrative assistant and is responsible to only a high-ranking official

   2. Staff employer/employee generally has no employees that are supervised

The Wheel Pattern


DESIGNER
EQUIPMENT CONSULTANT
OWNER-MANAGER
SALES CLERK
DELIVERY DRIVER

The Line or Military Pattern



Stockholders or Patrons

Board of Directors

Manager

Office Manager

Distribution Manager

Mill Manager

Secretary

Sales Clerk

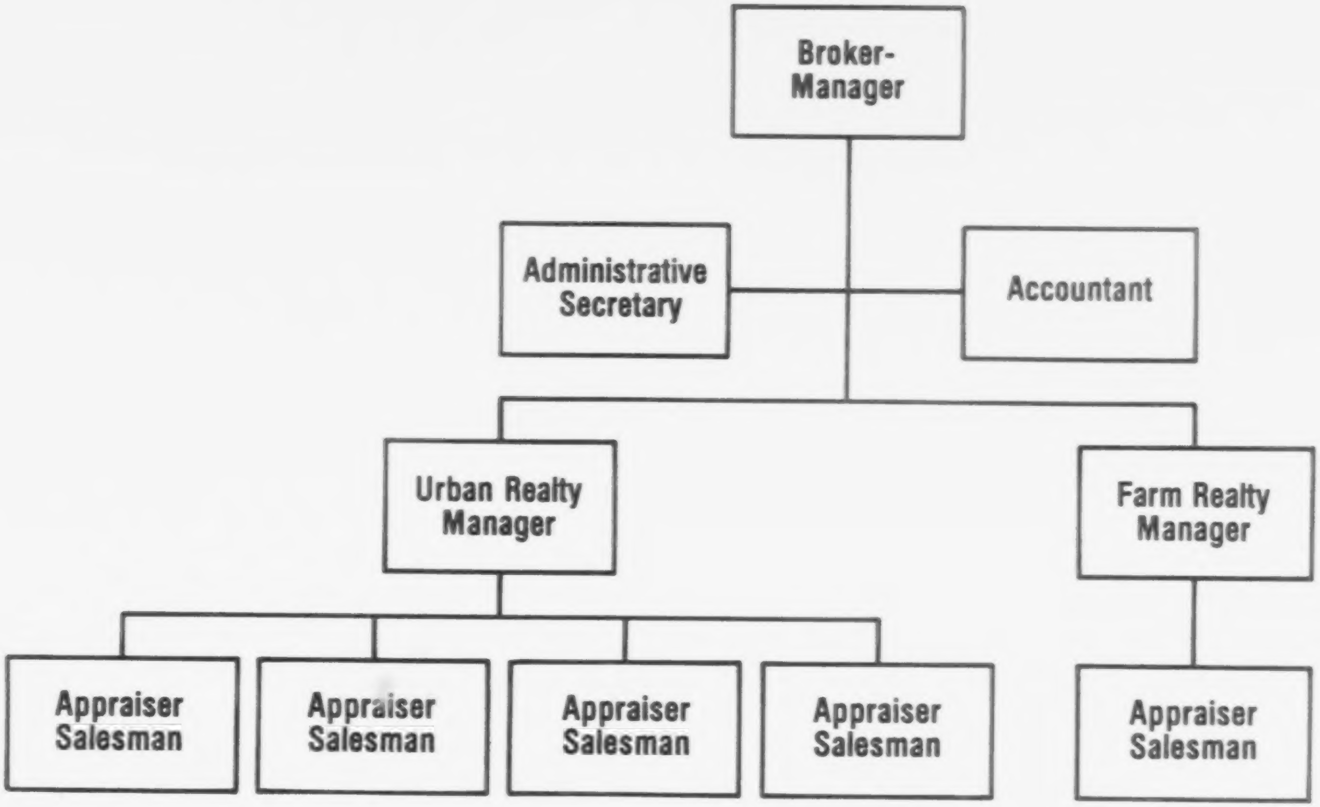
Lime and Fert. Spreader

Feed Delivery Driver

Grinder-Bagger

Grinder-Bagger

The Staff Pattern



Broker-Manager

Administrative Secretary

Accountant

Urban Realty Manager

Farm Realty Manager

Appraiser Salesman

Appraiser Salesman

Appraiser Salesman

Appraiser Salesman

Appraiser Salesman

BUSINESS ORGANIZATIONS
UNIT I

ASSIGNMENT SHEET #1 — COMPLETE A BUSINESS STRUCTURE WORKSHEET

Directions: Using the information sheet in this unit, fill in the blanks on the worksheet on the back of this page.

BUSINESS STRUCTURE WORKSHEET

TYPES OF BUSINESSES	FEATURES COMPARED			
	SOLE PROPRIETORSHIP	PARTNERSHIP	INVESTOR-ORIENTED CORPORATION	COOPERATIVE CORPORATION
Who Owns the Business				
How is Voting Conducted				
Who Manages the Company				
Who Gets the Profits				
How are Profits Distributed				
How are Taxes Paid				

BUSINESS ORGANIZATIONS
UNIT I

ANSWERS TO ASSIGNMENT SHEET

BUSINESS STRUCTURE WORKSHEET

TYPES OF BUSINESSES	FEATURES COMPARED			
	SOLE PROPRIETORSHIP	PARTNERSHIP	INVESTOR-ORIENTED CORPORATION	COOPERATIVE CORPORATION
Who Owns the Business	Owner	Two or more people	Many people by shares of stock	Members to whom they do business
How is Voting Conducted	___	As agreed upon	By stockholder in proportion to number of stocks owned	Each member has one vote
Who Manages the Company	Owner	Partners	A paid president	A paid manager
Who Gets the Profits	Owner	Partners	Stockholders	To members
How are Profits Distributed	___	As agreed upon	To stockholder in form of dividends	As patronage refunds
How are Taxes Paid	By Owner	By the partners	From the profits made	Member pays the tax on the earning

BUSINESS ORGANIZATIONS
UNIT I

NAME ____________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. A legal relationship existing between two or more persons contractually associated as joint principals in a business

_____b. A share in profits based on the amount of stock owned by an individual

_____c. Net worth; accumulated possessions calculated to bring in income

_____d. Any of the equal interests or rights into which the entire stock of a corporation is divided and ownership is evidenced by one or more certificates

_____e. An administrative and functional structure such as a cooperative or corporation

_____f. Voluntary contractual organization of persons having a mutual ownership interest in providing themselves a needed service on a non-profit basis

_____g. A person owning one or more shares in a business

_____h. A body formed and authorized by law to act as a single person although constituted by more than one person and legally endowed with various rights and duties

1. Capital
2. Organization
3. Cooperative
4. Stockholder
5. Partnership
6. Dividend
7. Share
8. Corporation

2. Match the types of business organizations on the right with their characteristics.

_____a. Business that requires more capital than one or two people have to invest; ownership is by shares of stock; capital for the business comes from the sale of stock and from returns from goods and services provided; in a business failure, the corporation is liable to the full extent of its assets

_____b. Business is owned by one person; all decisions and policies are made by the owner; profits are enjoyed by the owner; liability of the business rests upon the owner

1. Private ownership (sole proprietorship)
2. Partnership
3. Investor-oriented corporation
4. Cooperative corporation

TEST

______c. Formed mainly for the members with whom to do business; basic policy is determined at general meetings open to all members; members elect a board of directors who make policy decisions

______d. Two or more people are able to invest more capital jointly in a business venture; profits or losses are shared by owners; in case of business failure, all partners may be liable to the extent of their partnership

3. Match the types of cooperative corporations on the right with their characteristics.

______a. Provide supplies for members; buy suppliers in quantity and pass savings on to the members; manufacture and distribute supplies to provide an even greater savings to members; may perform both marketing and purchasing functions

______b. Provide specialized services in areas such as livestock breeding, irrigation, farm machinery, pest control management, financial services, and utilities; provide farm credit service

______c. Provide a variety of off-farm processing and marketing services; help producers to grow and process quality farm products to market specifications; enable members to extend control of their products through the processing and marketing channels

1. Marketing cooperatives
2. Purchasing cooperatives
3. Service cooperatives

4. Select true statements concerning common types of organizational patterns by placing an "X" in the appropriate blanks.

a. Wheel pattern

______1) The authority is concentrated in several people

______2) Because of the small number of employees in the business, each may perform several different functions

TEST

b. Line or military pattern

______1) Each employee, regardless of rank, supervises one or more employees

______2) Each employee is responsible to only one supervisor

______3) Employees and manager are responsible to the owners or board of directors

c. Staff pattern

______1) Staff employee is frequently called an administrative assistant and is responsible to only a high-ranking official

______2) Staff employer/employee generally has employees that are supervised

(NOTE: If the following activity has not been accomplished prior to the test, ask your instructor when it should be completed.)

5. Complete a business structure worksheet.

BUSINESS ORGANIZATIONS
UNIT I

ANSWERS TO TEST

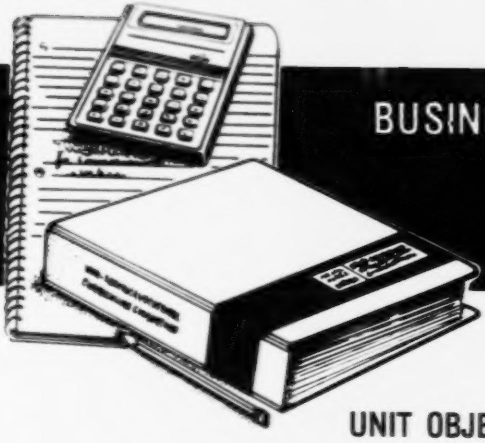
1. a. 5
   b. 6
   c. 1
   d. 7
   e. 2
   f. 3
   g. 4
   h. 8

2. a. 3
   b. 1
   c. 4
   d. 2

3. a. 2
   b. 3
   c. 1

4. a. 2
   b. 2
   c. 1

5. Evaluated to the satisfaction of the instructor



BUSINESS MACHINES
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to identify parts of a cash register, ten-key adding machine, electronic calculator, and identify major components of a microcomputer system. The student should also be able to use and balance a cash register, use an electronic calculator, and count change. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment and job sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to business machines with their correct definitions.
2. Identify parts of a cash register.
3. Complete a list of statements concerning cash drawer arrangement.
4. Identify parts of a ten-key adding machine.
5. Identify parts of an electronic calculator.
6. Match major microcomputer components with their functions.
7. List three general uses of the microcomputer.
8. Complete a list of statements concerning the microfiche system and how to use it.
9. List three reasons for checking daily cash balance.
10. Complete a list of statements concerning the procedure for checking daily cash balance.

OBJECTIVE SHEET

11. Identify major components of a microcomputer system.
12. Count change.
13. Balance a cash register.
14. Figure sales tax and total amount of sale using an electronic calculator.
15. Demonstrate the ability to:
    a. Use a cash register.
    b. Use an electronic calculator.
    c. Add and subtract on an electronic calculator.
    d. Multiply and divide on an electronic calculator.
    e. Use an electronic calculator to figure percentages.
    f. Use an electronic calculator to figure discounts.

BUSINESS MACHINES
UNIT II

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information, assignment, and job sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Discuss and demonstrate the procedures outlined in the job sheets.

VII. Display various types of sales receipts made on current business machines.

VIII. Obtain agribusiness products which display the Universal Product Code and invite a resource person from a local store which uses the code to discuss the benefits with class.

IX. Have class spend time with the school's business instructor in the use of machines.

X. Provide students with a local tax table and discuss state and local taxes.

XI. Use assignment sheets #1 through #4 as a pre-test for students to check their knowledge of business machines. An oral exam using the actual machines is another means of testing the student's knowledge.

XII. Take students on a field trip to view business machines in use and have a representative explain the functions of each machine in the particular department.

XIII. Demonstrate the proper method for counting change prior to having students complete Assignment Sheet #5.

XIV. Demonstrate the proper procedure for arranging a cash drawer.

XV. Obtain a microfiche reader and microfiche cards from an area agribusiness and demonstrate their use to class.

XVI. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

INSTRUCTIONAL MATERIALS

C. Transparency masters

   1. TM 1 — Hand Scanner
   2. TM 2 — Universal Product Code
   3. TM 3 — Parts of a Cash Register
   4. TM 4 — Cash Drawer
   5. TM 5 — Parts of a Ten-Key Adding Machine
   6. TM 6 — Parts of an Electronic Calculator
   7. TM 7 — Major Components of a Microcomputer System
   8. TM 8 — Microfiche System

D. Assignment sheets

   1. Assignment Sheet #1 — Identify Parts of a Cash Register
   2. Assignment Sheet #2 — Identify Parts of a Ten-Key Adding Machine
   3. Assignment Sheet #3 — Identify Parts of an Electronic Calculator
   4. Assignment Sheet #4 — Identify Major Components of a Microcomputer System
   5. Assignment Sheet #5 — Count Change
   6. Assignment Sheet #6 — Balance a Cash Register
   7. Assignment Sheet #7 — Figure Sales Tax and Total Amount of Sale Using an Electronic Calculator

E. Answers to assignment sheets

F. Job sheets

   1. Job Sheet #1 — Use a Cash Register
   2. Job Sheet #2 — Use an Electronic Calculator
   3. Job Sheet #3 — Add and Subtract on an Electronic Calculator
   4. Job Sheet #4 — Multiply and Divide on an Electronic Calculator
   5. Job Sheet #5 — Use an Electronic Calculator to Figure Percentages
   6. Job Sheet #6 — Use an Electronic Calculator to Figure Discounts

G. Answers to job sheets

INSTRUCTIONAL MATERIALS

H. Test

I. Answers to test

II. References:

A. Carlile, Robert. *Agriculture Sales and Service.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

B. Nelson, Frank W. *Distributive Education II.* Stillwater, OK: Oklahoma Curriculum and Instructional Materials Center, 1976.

C. Burrow, Elaine. *Office Machines.* Commerce, TX: Occupational Curriculum Laboratory, East Texas State University, 1981.

BUSINESS MACHINES
UNIT II

INFORMATION SHEET

I. **Terms and definitions**

A. Cash register — Machine which indicates the amount of each sale and records the amount of money received; usually has a change drawer and may automatically make change

B. Change bank — Amount of money placed in cash register for use during the day

(NOTE: This is commonly referred to as the "til".)

C. Electronic calculator — Device used for performing mathematical calculations electronically

D. Microcomputer — Small but complete computer system capable of accepting information, applying processes to information and data, and supplying results of these processes

E. Microfiche card — Sheet of microfilm containing rows of microimages of pages of printed matter

F. Microfiche reader — Machine which magnifies microimages and projects them on a screen so that printed matter is easy to read

G. Point-of-sale system — Electronic cash register system wired to a computer which provides additional information on the sales receipt; records sales, changes in inventory, and cash supply in the accounting office

H. Scanner — Instrument that reads information from the Universal Product Code; held in the checker's hand or built into the countertop (Transparency 1)

I. Ten-key adding machine — Machine used to add several figures together to provide a total amount

(NOTE: This machine is being replaced by the electronic calculator.)

J. Touch method — Operating a cash register using specific finger positions for faster speed, rhythm, and accuracy

K. Universal Product Code — Set of numbers printed on a package to identify particular product, manufacturer, and price information when scanned by a point-of-sale cash register system (Transparency 2)

INFORMATION SHEET

II. **Parts of a cash register** (Transparency 3)

A. Clear key

B. Decimal key

C. Receipt

D. Receipt on/off switch

E. Tax keys

F. Clerk key

G. Display

H. Register on/off key

I. Classification keys

J. Department keys

K. Number amount keys

L. Cash drawer

III. **Cash drawer arrangement** (Transparency 4)

A. Place all bills facing the same way to prevent mistakes and to save time in arranging the money to send to the bank

B. Arrange the money from right to left with the smaller bills and coins on the right

C. Keep checks, coupons, and large bills tied together with a rubber band or paper clip and place them under the cash drawer

D. Wrinkle new bills so they will not stick together

IV. **Parts of a ten-key adding machine** (Transparency 5)

A. Repeat key

B. Correction (Clear) key

INFORMATION SHEET

- C. Subtotal key
- D. Non-add key
- E. Subtraction (Minus) key
- F. Plus (Motor) bar
- G. Total key

V. **Parts of an electronic calculator** (Transparency 6)

(NOTE: Due to the large number of systems the key placement may vary, but all machines should have basic keys.)

- A. Display

  (NOTE: The presence of digits in the display is an indication that power is on.)

- B. Clear error key
- C. On and off switch
- D. Clear key
- E. Decimal key

  (NOTE: A decimal point will automatically appear to the right of any number entered unless positioned in another sequence by use of decimal key.)

- F. Number keys
- G. Additional key

  (NOTE: Repeated depressions continue to add the last number entered to the total.)

- H. Total key
- I. Subtotal key
- J. Subtraction key

  (NOTE: Repeated depressions continue to subtract the last number entered from the result.)

- K. Percentage key

INFORMATION SHEET

- L. Division key
- M. Number/Date key

  (NOTE: Many electronic calculators have provisions for memory. Use individual manufacturer's specifications for operating instructions.)

VI. **Major microcomputer components and their functions** (Transparency 7)

- A. Keyboard — Used to input data into the system
- B. Monitor — Displays output
- C. Processor — Processes data which is fed into system
- D. Disk drive(s) — Reads and/or writes data on floppy diskette
- E. Printer — Outputs data onto paper

VII. **General uses of the microcomputer**

- A. Accounting
  1. Record keeping
  2. Budgeting
  3. Enterprise analysis
  4. Cost analysis
- B. Data processing
  1. Files
  2. Addresses
- C. Word processing
  1. Letter writing
  2. Storage
  3. Editing

INFORMATION SHEET

VIII. **The microfiche system and how to use it** (Transparency 8)

(NOTE: Many farm implement dealers are supplied with catalog pages on microfilm and use microfiche readers to order parts. This eliminates much of the space needed for catalog racks.)

A. Catalog pages are reduced and put in rows of microimages on microfiche cards

B. Since these images are too small to read with the naked eye, microfiche readers are used to magnify the images and project them onto a viewing screen

C. The microfiche cards are labeled according to year, model, and types of parts shown on each card

D. When a customer gives the necessary information to look up a part, simply locate the corresponding card and place it in the reader

E. Find appropriate grouping and page for part needed

F. Choose correct part number

(NOTE: The same information is given in catalogs and on microfiche cards; the advantage of microfilm is the tremendous amount of material that can be condensed onto one card; for example, a catalog consisting of 1,000 pages or more could easily be contained on one 4" × 6" card.)

IX. **Reasons for checking daily cash balance**

A. Check on money that might be lost or misplaced

B. Check on mistakes that might be made in making change or writing sales slips

(NOTE: This is one reason for always writing the amount of a check given in payment on the sales ticket so that the figures for change can be checked.)

C. Check on money that might be taken from the cash drawer and not accounted for

X. **Procedure for checking daily cash balance**

A. Count cash and checks on hand at the beginning of the day

B. Add all cash and checks taken in during the day

INFORMATION SHEET

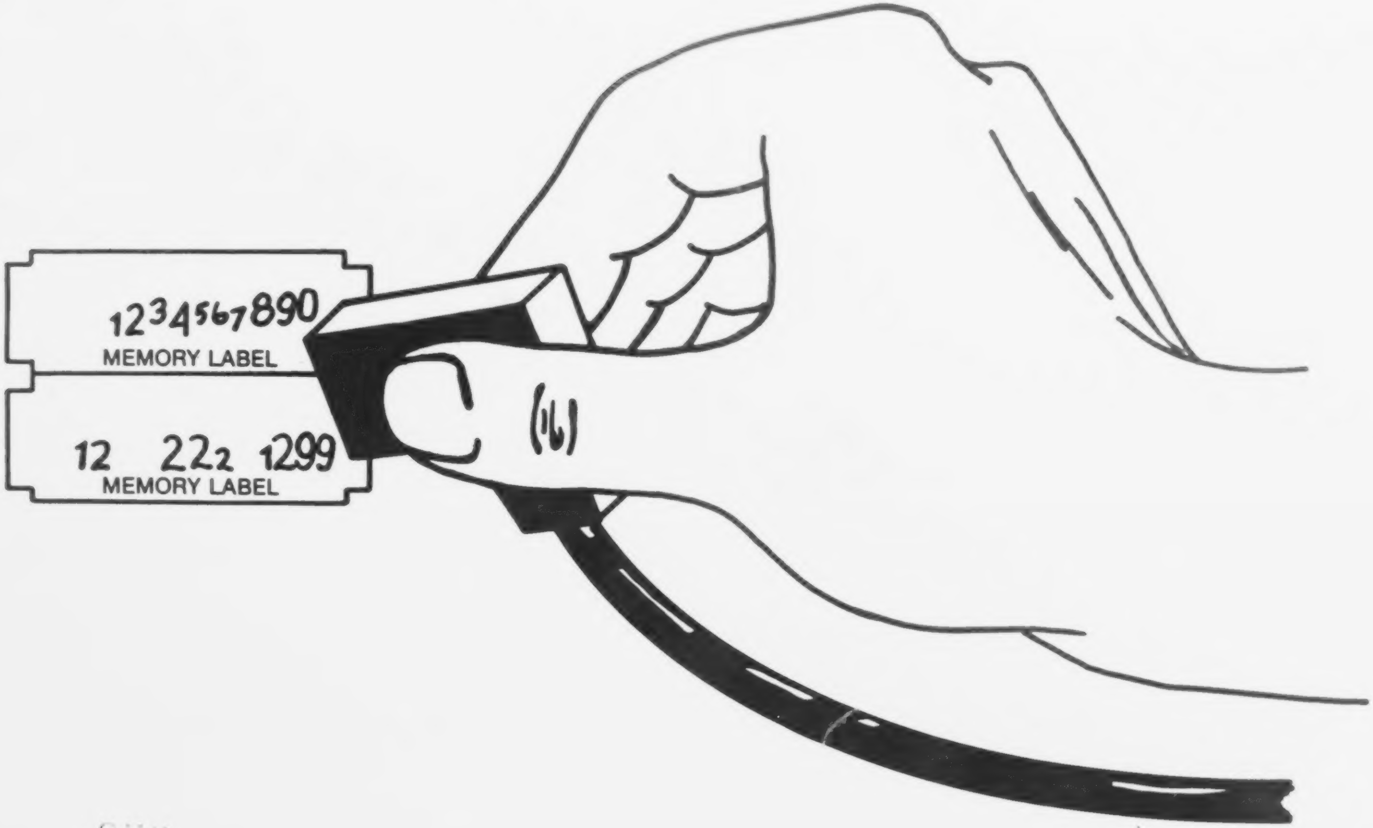
C. Subtract any money taken out during the day

1. Any cash paid out to freight or similar expenses
2. Bank deposits

D. This equals the new cash balance

Example:	$ 136.30	Cash and checks on hand at the beginning of the day
	1258.70	Cash and checks taken in during the day (for cash sales and payments on account)
	5.00	Cash paid out for freight charges
	1250.00	Bank deposit
	240.00	Cash balance at the end of the day

Hand Scanner

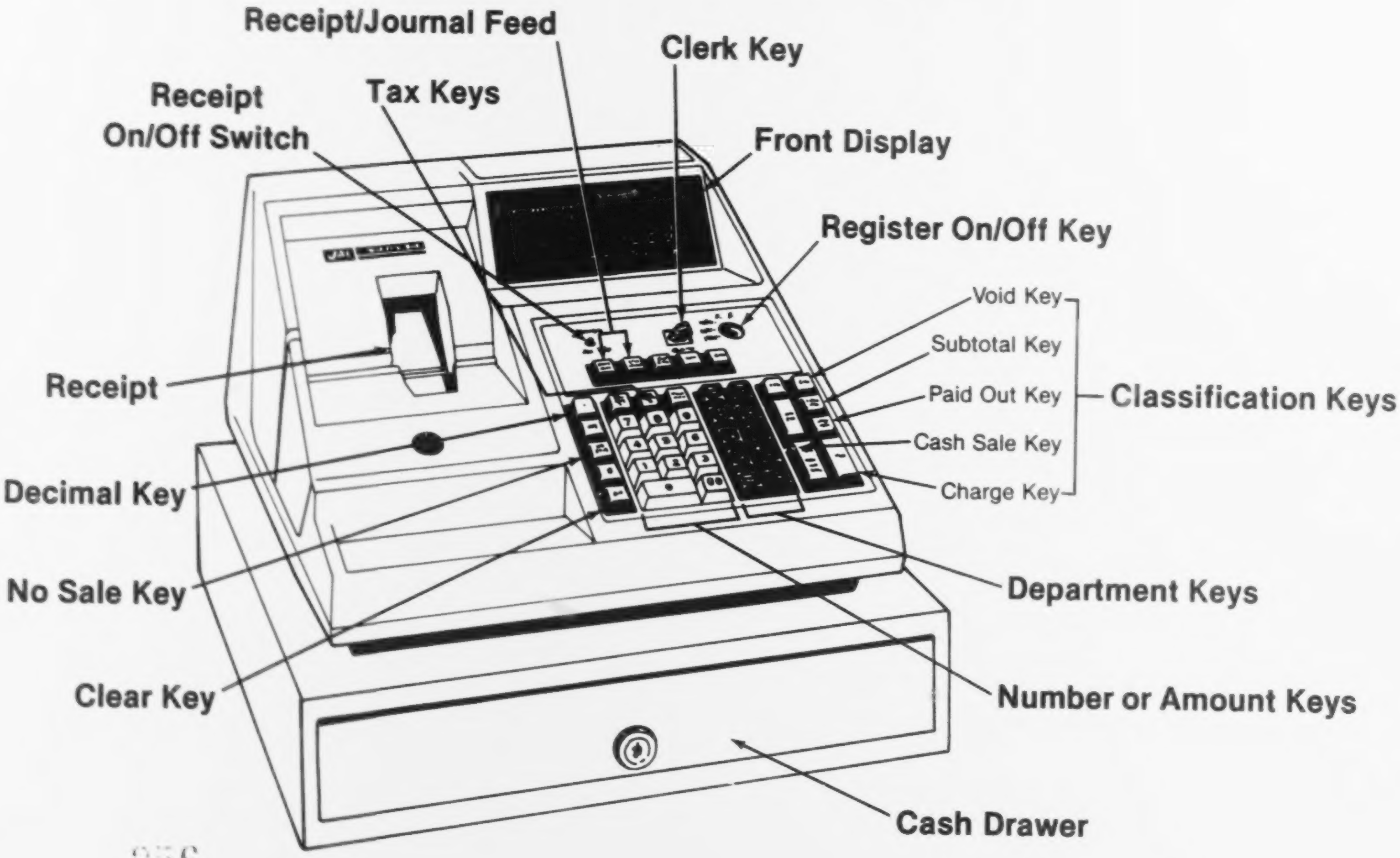

1234567890
MEMORY LABEL
12 222 1299
MEMORY LABEL

Universal Product Code

0

36000 24490

Parts of a Cash Register


Receipt/Journal Feed
Clerk Key
Receipt On/Off Switch
Tax Keys
Front Display
Register On/Off Key
Void Key
Subtotal Key
Paid Out Key
Cash Sale Key
Charge Key
Classification Keys
Receipt
Decimal Key
No Sale Key
Clear Key
Department Keys
Number or Amount Keys
Cash Drawer

256

257

TM 3

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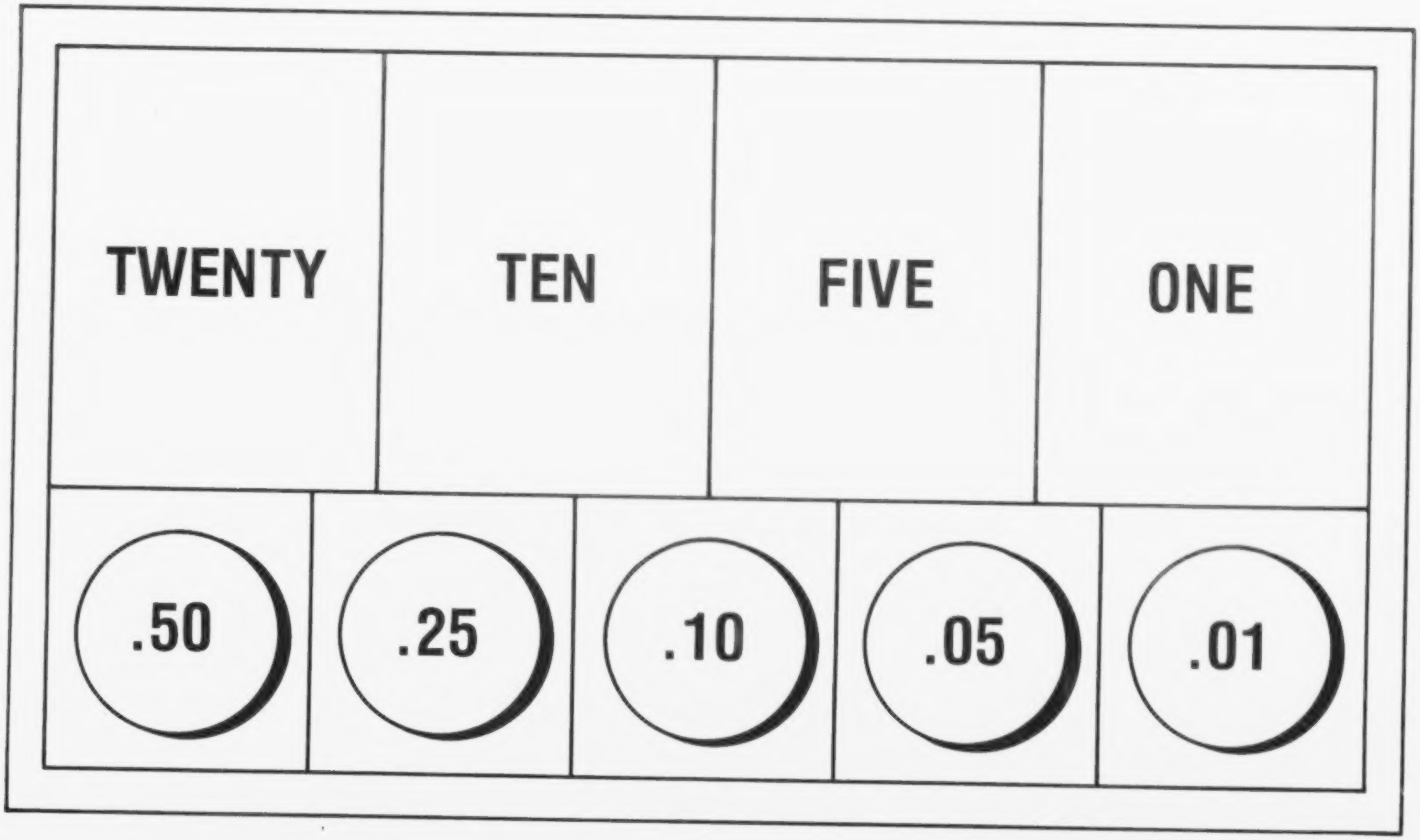
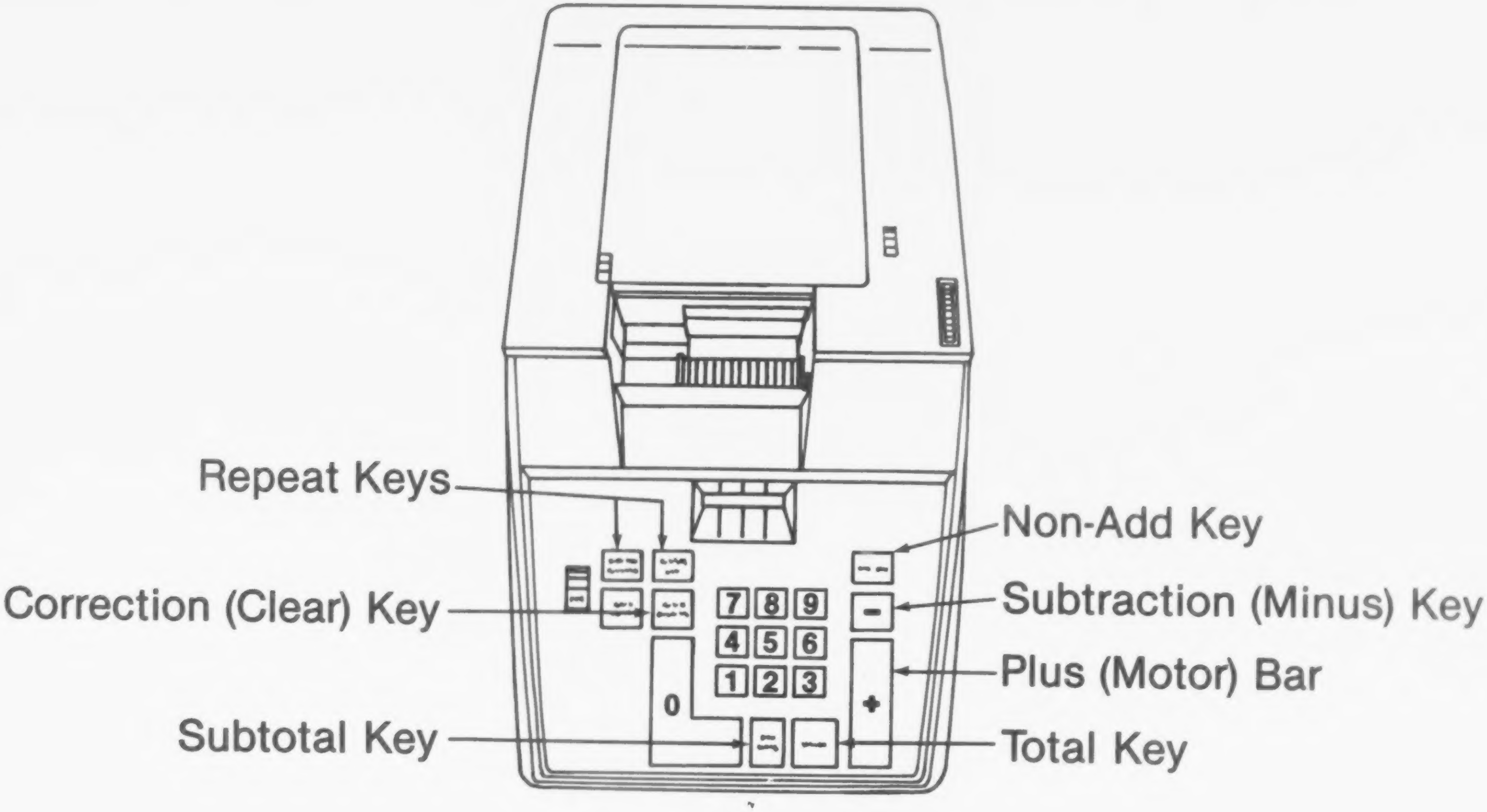
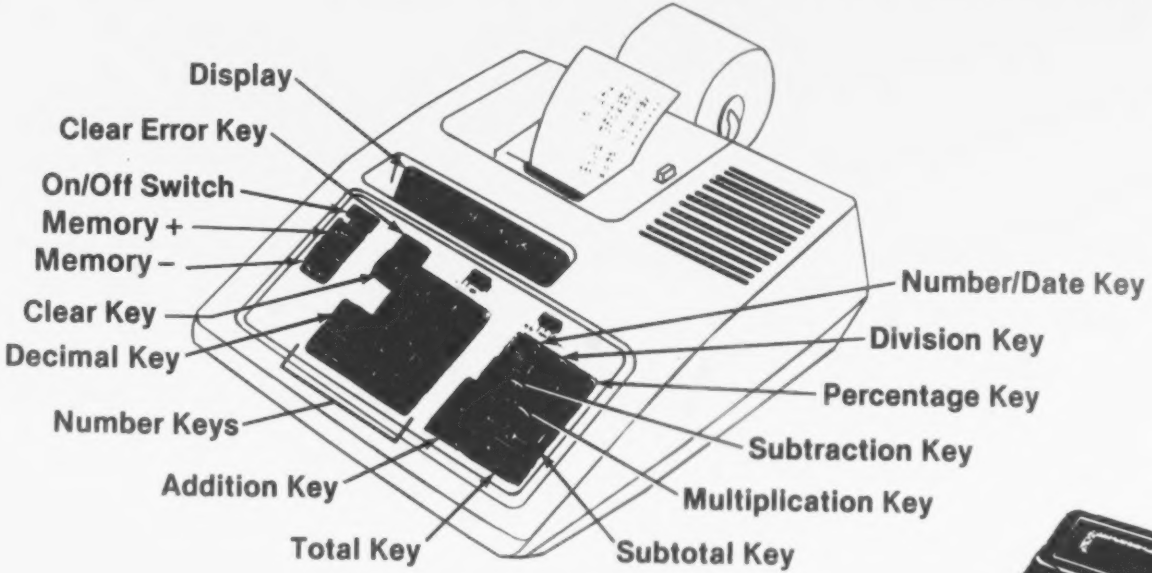
Cash Drawer


TWENTY
TEN
FIVE
ONE
.50
.25
.10
.05
.01

Parts of a Ten-Key Adding Machine


Repeat Keys
Non-Add Key
Correction (Clear) Key
Subtraction (Minus) Key
Plus (Motor) Bar
Subtotal Key
Total Key
7 8 9
4 5 6
1 2 3
0
+
−

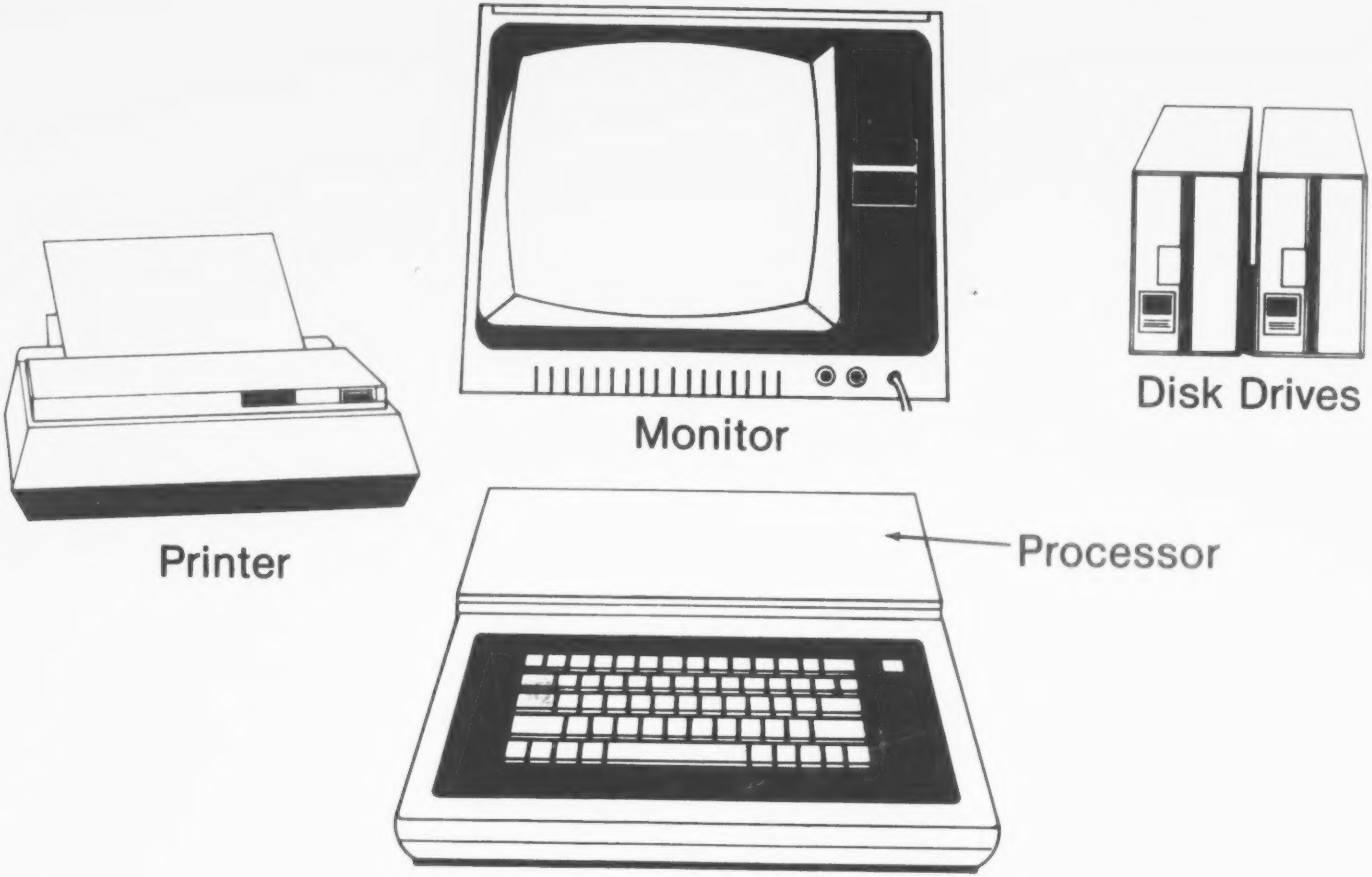
Parts of an Electronic Calculator


Display
Clear Error Key
On/Off Switch
Memory +
Memory –
Clear Key
Decimal Key
Number Keys
Addition Key
Total Key
Number/Date Key
Division Key
Percentage Key
Subtraction Key
Multiplication Key
Subtotal Key

Electronic Display/Print Calculator

Portable Electronic Calculator

Major Components of a Microcomputer System



Monitor

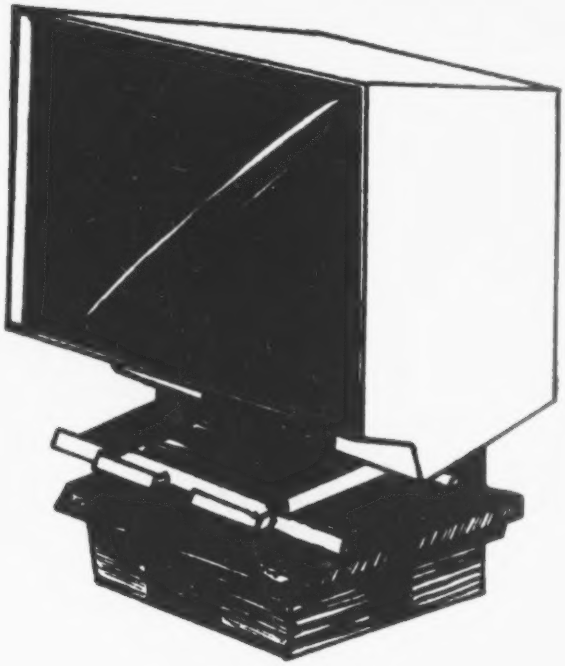
Disk Drives

Printer

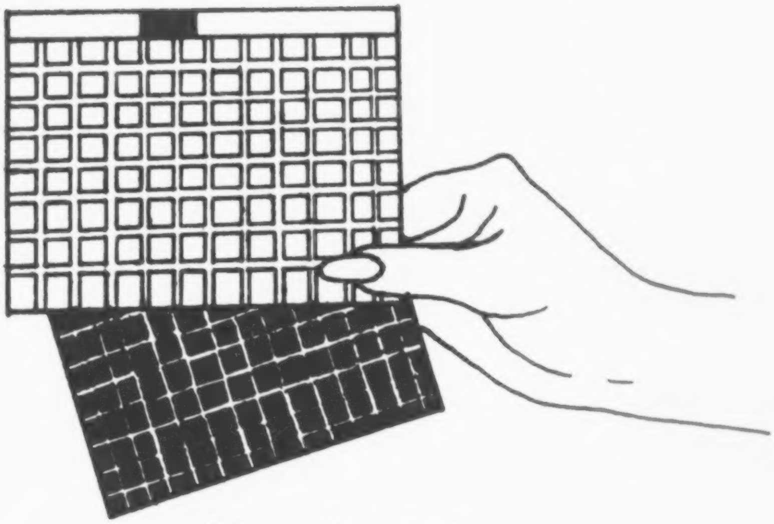
Processor

Microcomputer with Keyboard

Microfiche System



Microfiche Reader

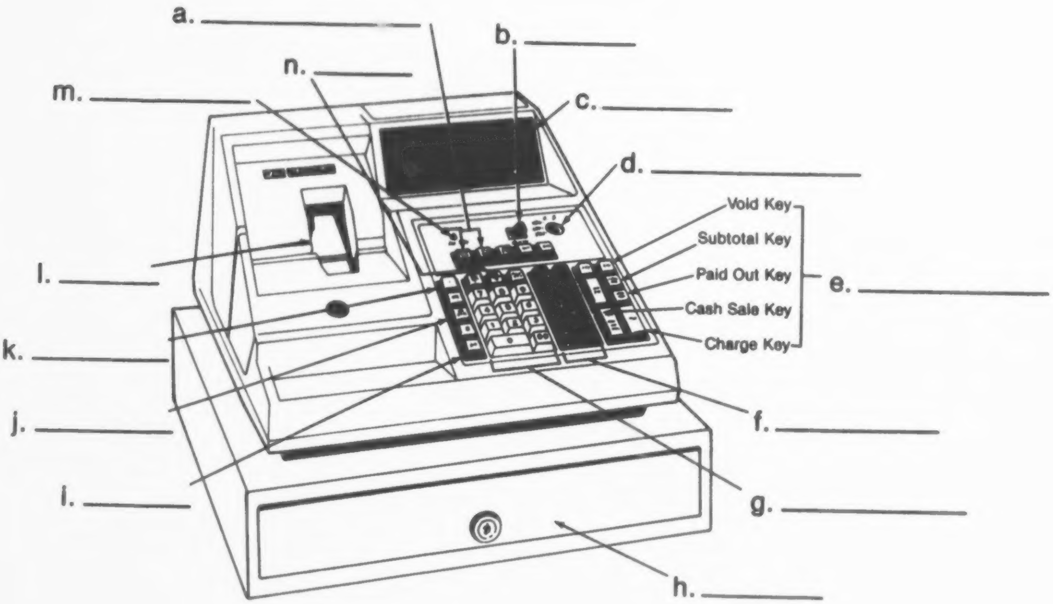


Microfiche Cards

BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #1 — IDENTIFY PARTS OF A CASH REGISTER

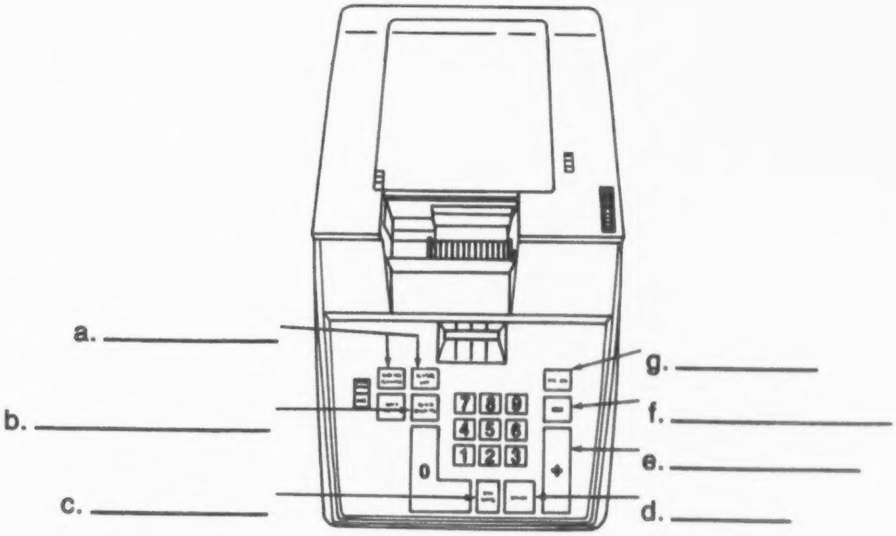
Directions: Identify parts of a cash register by placing the correct name in each blank.


a. ____________
b. ________
n. ________
m. ____________
c. ________
d. ____________
Void Key
Subtotal Key
Paid Out Key
Cash Sale Key
Charge Key
e. ____________
l. ______
k. ____________
j. ____________
f. ____________
i. ______
g. ____________
h. ________

BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #2 — IDENTIFY PARTS OF A TEN-KEY ADDING MACHINE

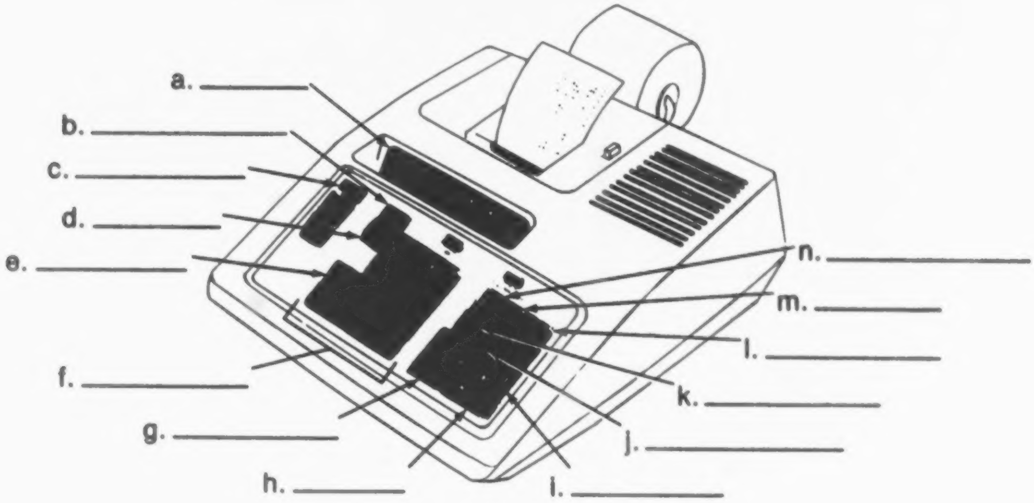
Directions: Identify parts of a ten-key adding machine by placing the correct name in each blank.



BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #3 — IDENTIFY PARTS OF AN ELECTRONIC CALCULATOR

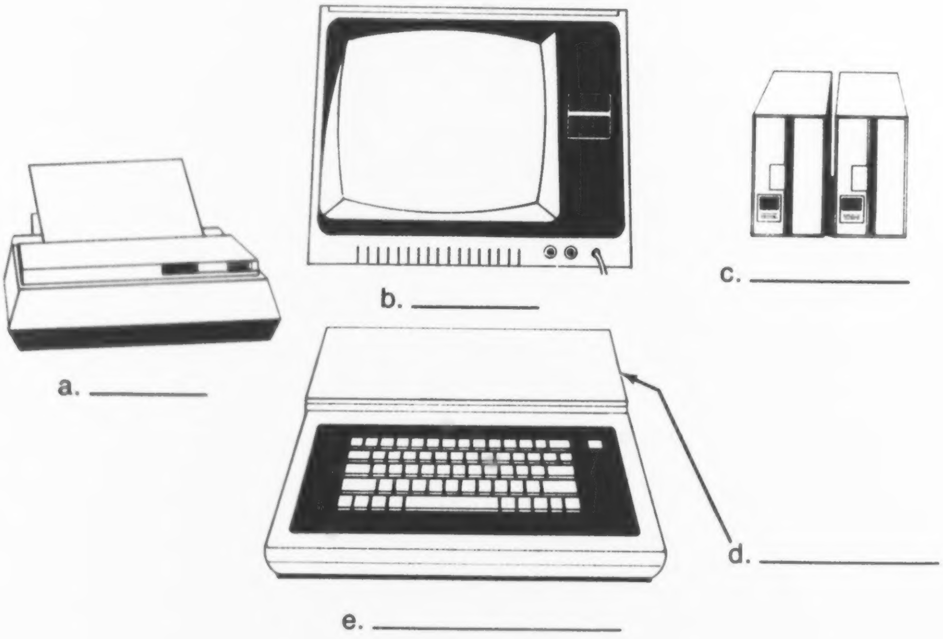
Directions: Identify parts of an electronic calculator by placing the correct name in each blank.



BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #4 — IDENTIFY MAJOR COMPONENTS OF A MICROCOMPUTER SYSTEM

Directions: Identify parts of a microcomputer system by placing the correct name in each blank.



BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #5 — COUNT CHANGE

Directions: Use the fewest number of coins and bills to record the correct amount of change for each sale listed below.

Example:

Sales No.	Amount of Sale	Amount Received	Coins					Bills		
			1¢	5¢	10¢	25¢	50¢	$1	$5	$10
1.	$1.98	$5.00	2					3		

Sales No.	Amount of Sale	Amount Received	Coins					Bills		
			1¢	5¢	10¢	25¢	50¢	$1	$5	$10
1.	$ 9.15	$20.15								
2.	$24.95	$50.00								
3.	$12.40	$15.00								
4.	$32.41	$40.00								
5.	$15.25	$20.25								
6.	$27.80	$30.00								
7.	$ 8.12	$10.00								
8.	$13.00	$20.00								
9.	$18.21	$20.00								
10.	$14.67	$20.00								

BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #6 — BALANCE A CASH REGISTER

Directions: After reading the instructions and sample balance sheet below, complete the balance sheet on the following page using an electronic calculator.

The cash register should have $130.00 in it and there should be $55.00 worth of totaled sales tickets. Count all the cash on hand and record the amount. Total all the tickets or read the sales tape on the cash register and subtract the amount of sales from the cash that was in the cash register before any sales were received. If the two amounts are the same, the cash box balances.

SAMPLE BALANCE SHEET

Original change bank = $ 75.00

Total cash on hand after sales = 130.00

Coins

Half dollars = $ 15.00
Quarters = $ 19.00
Dimes = $ 8.30
Nickels = $ 3.00
Pennies + $ 1.70

$ 47.00 +

Bills

Ones = $28.00
Fives = $25.00
Tens = $10.00
Twenties = $20.00

$83.00 = $130.00

Total cash on hand $130.00
Change bank − 75.00
Total (cash sales) $ 55.00

Total of sales tickets = $ 55.00

Double check
Change bank = $ 75.00
Total of sales tickets = +55.00

$130.00

ASSIGNMENT SHEET #6

(NOTE: Assume the box balances.)

BALANCE SHEET

Original change bank = $75.00

Total cash on hand after sales = __________(1)

Coins			Bills		
Half dollars	=	$12.50	Ones	=	$21.00
Quarters	=	$ 7.25	Fives	=	$10.00
Dimes	=	$ 3.60	Tens	=	$20.00
Nickels	=	$ 2.95	Twenties	=	$60.00
Pennies	+	$ .23			

$______(2) + $______(3) = $______(4)

Total cash on hand $______(5)

Change bank $-75.00

Total (cash sales) $______(6)

Total of sales tickets $______(7)

Double check
Change bank $ 75.00

Total of sales tickets $______(8)

$______(9)

ASSIGNMENT SHEET #6

(NOTE: This is an optional assignment. Check with your instructor to obtain figures needed to complete the balance sheet below. Assume the box balances.)

BALANCE SHEET

Original change bank = ____________________

Total cash on hand after sales = ____________________(1)

Coins			Bills				
Half dollars	=	_______________	Ones	=	_______________		
Quarters	=	_______________	Fives	=	_______________		
Dimes	=	_______________	Tens	=	_______________		
Nickels	=	_______________	Twenties	=	_______________		
Pennies	+	_______________					
		$_______(2)	+		$_______(3)	=	$_______(4)

Total cash on hand $_______(5)

Change bank $_______

Total (cash sales) $_______(6)

Total of sales tickets $_______(7)

Double check

Change bank $_______

Total of sales tickets $_______(8)

$_______(9)

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BUSINESS MACHINES
UNIT II

ASSIGNMENT SHEET #7 — FIGURE SALES TAX AND TOTAL AMOUNT OF SALES USING AN ELECTRONIC CALCULATOR

Directions: Use an electronic calculator to figure sales tax and total amount of sale on each of the problems below. Figure tax at 4 percent using the table below.

TAX TABLE

.01 — .12 - - - - - - - - .00
.13 — .37 - - - - - - - - .01
.38 — .62 - - - - - - - - .02
.63 — .87 - - - - - - - - .03
.88 — 1.12 - - - - - - - - .04

1.
3.95
4.19
4.19
6.50
2.95

Subtotal ______
Tax ______
Total ______

2.
1.79
3.49
5.19
.69
.69

Subtotal ______
Tax ______
Total ______

3.
12.99
7.19
4.69
3.50
.49

Subtotal ______
Tax ______
Total ______

4.
147.99
7.15
39.50
17.85
3.95
65.00
.79
.49

Subtotal ______
Tax ______
Total ______

5.
1,295.00
380.00
79.95
19.95
4.19
4.19
4.19
27.00

Subtotal ______
Tax ______
Total ______

6.
87.00
45.00
69.95
79.95
3.15
.69
.89
2.19

Subtotal ______
Tax ______
Total ______

ASSIGNMENT SHEET #7

7.		8.		9.	
	117.50		280.00		1,760.00
	119.75		85.00		349.00
	87.50		119.95		67.00
	28.95		69.50		76.00
	39.00		17.25		14.75
	5.19		49.50		8.95
	5.19		29.50		11.50
	12.50		16.00		28.00
	14.75		8.50		16.95
	6.15		4.19		9.75
Subtotal	______	Subtotal	______	Subtotal	______
Tax	______	Tax	______	Tax	______
Total	______	Total	______	Total	______

10.		11.		12.	
	650.00		13,489.95		379.95
	129.95		209.00		216.00
	75.00		65.00		107.50
	40.50		49.95		98.15
	19.50		39.95		147.29
	19.50		74.50		14.75
	19.50		12.15		5.19
	7.19		16.24		6.49
	5.10		8.00		49.95
	12.50		13.65		13.95
Subtotal	______	Subtotal	______	Subtotal	______
Tax	______	Tax	______	Tax	______
Total	______	Total	______	Total	______

BUSINESS MACHINES
UNIT II

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

a. Receipt/journal feed
b. Clerk key
c. Front display
d. Register on/off key
e. Classification keys
f. Department keys
g. Number or amount keys
h. Cash drawer
i. Clear key
j. No sale key
k. Decimal key
l. Receipt key
m. Receipt on/off switch
n. Tax keys

Assignment Sheet #2

a. Repeat keys
b. Correction (clear) key
c. Subtotal key
d. Total key
e. Plus (motor) bar
f. Subtraction (minus) key
g. Non-add key

Assignment Sheet #3

a. Display
b. Clear error key
c. On/off switch
d. Clear key
e. Decimal key
f. Number keys
g. Addition key
h. Total key
i. Subtotal key
j. Multiplication key
k. Subtraction key
l. Percentage key
m. Division key
n. Number/date key

Assignment Sheet #4

a. Printer
b. Monitor
c. Disk drive(s)
d. Processor
e. Keyboard

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #5

Part A

1. A one-dollar bill and a ten-dollar bill
2. One nickel, one five-dollar bill, and two ten-dollar bills
3. One dime, one fifty-cent piece, and two one-dollar bills
4. Four pennies, one nickel, one fifty-cent piece, two one-dollar bills, and one five-dollar bill
5. One five-dollar bill
6. Two dimes and two one-dollar bills
7. Three pennies, one dime, one quarter, one fifty-cent piece, and one dollar bill
8. Two one-dollar bills and one five-dollar bill
9. Four pennies, one quarter, one fifty-cent piece, and a one-dollar bill
10. Three pennies, one nickel, one quarter, and one five-dollar bill

Assignment Sheet #6

1. $137.53
2. $26.53
3. $111.00
4. $137.53
5. $137.53
6. $62.53
7. $62.53
8. $62.53
9. $137.53

Assignment Sheet #7

1. 21.78, .87, 22.65
2. 11.85, .47, 12.32
3. 28.86, 1.15, 30.01
4. 282.72, 11.31, 294.03
5. 1,814.47, 72.58, 1,887.05
6. 288.82, 11.55, 300.37
7. 436.48, 17.46, 453.94
8. 679.39, 27.18, 706.57
9. 2,341.90, 93.68, 2,435.58
10. 978.74, 39.15, 1,017.89
11. 13, 978.39, 559.14, 14,537.53
12. 1,039.22, 41.57, 1,080.79

BUSINESS MACHINES
UNIT II

JOB SHEET #1 — USE A CASH REGISTER

(NOTE: Accuracy on the cash register is important because the information recorded on the register tape may be used to determine shrinkage, measure sales, and influence decisions on what to reorder. Accuracy is also important for winning a customer's confidence, particularly with rising prices and the use of hand calculators by customers to determine the accuracy of the checker.)

I. Materials

   A. Cash register

   B. Tape

   C. Dummy merchandise

   D. Department labels

   E. Sample problems

II. Procedure

   A. Label the department keys A, B, C, D, and E

   B. Have someone call the numbers on the following pages aloud

   C. Practice checking until you can accurately check each list

   D. Use the tax table for your area to figure tax on the subtotal

   E. Add tax to the subtotal to get the final total

   F. Practice checking dummy merchandise when you have completed exercises on following pages

JOB SHEET #1

Exercise 1

Amount	Department
.01	A
.10	D
.03	B
.02	C
.01	A
.03	D
2.00	E
.10	C
.01	B
.02	E
.20	D
.03	E
.01	A
.30	E
.20	C
.02	D
.10	B
1.00	A
.30	C
.10	D
.02	A
3.00	C
.20	B
.02	B

Subtotal 7.83

Tax ________

Total ________

Exercise 2

Amount	Department
.04	B
.09	A
.90	C
.05	B
.40	C
.80	C
.08	B
.06	D
.50	E
7.00	E
.60	A
.07	B
6.00	E
.60	D
.50	C
.08	B
.09	E
5.00	D
.40	A
.08	C
.09	D
.70	D
.07	A
4.00	A

Subtotal 28.20

Tax ________

Total ________

JOB SHEET #1

Exercise 3

Amount	Department
.11	D
.09	C
.44	E
.22	B
.10	C
.80	B
.33	E
.20	D
.70	E
.44	C
.02	B
.03	D
.55	A
.60	E
.50	C
.66	B
.40	D
.33	A
.77	E
.10	C
.20	A
.88	D
.30	B
.99	D

Subtotal 9.76

Tax __________

Total __________

Exercise 4

Amount	Department
.45	C
.33	D
.56	A
.55	E
.89	C
.77	A
.78	D
.01	E
.04	A
.80	E
.22	C
.99	A
.02	A
.05	B
.90	D
.06	A
.88	C
.66	B
.87	B
.11	D
.98	C
.65	E
.03	D
.54	E

Subtotal 12.14

Tax __________

Total __________

JOB SHEET #1

Exercise 5

Amount	Department
.12	A
.34	C
.23	B
.56	C
.65	A
.46	E
.43	B
.75	D
2.10	E
.86	E
.32	A
.35	C
1.20	B
.76	D
4.30	E
.52	A
3.20	C
2.30	D
.61	A
3.40	E
.17	B
.49	D
.21	C
.67	B

Subtotal 25.00

Tax __________

Total __________

BUSINESS MACHINES
UNIT II

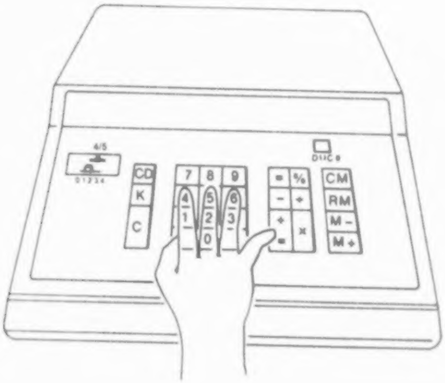
JOB SHEET #2 — USE AN ELECTRONIC CALCULATOR

I. Equipment needed — Electronic calculator

II. Procedure

- A. Clear work space of unnecessary items
- B. Place calculator to right of working materials
- C. Read job sheet thoroughly before beginning problems
- D. Turn machine on
- E. Set decimal selector at 0
- F. Place index finger, middle finger, and ring finger on home row keys (Figure 1)

FIGURE 1



(NOTE: Index finger is placed on 4 key, middle finger on 5 key, and ring finger on 6 key. This is referred to as the touch method.)

- G. Use the home row fingers to depress the following keys
  - 1. Index finger
    - a. Reach up from the 4 key to strike the 7 key
    - b. Reach down from the 4 key to strike the 1 key

JOB SHEET #2

2. Middle finger
    a. Reach up from the 5 key to strike the 8 key
    b. Reach down from the 5 key to strike the 2 key
3. Ring finger
    a. Reach up from the 6 key to strike the 9 key
    b. Reach down from the 6 key to strike the 3 key

H. Use the thumb to strike the 0 key

I. Use the little finger to strike the operational keys to the right of the numeric keyboard

J. Use the index finger to strike operational keys to the left of the numeric keyboard

K. Complete each problem below using touch method

1. Index first number
2. Depress the plus key
3. Repeat steps 1 and 2 for all remaining numbers in column
4. Depress the total key

(NOTE: The Total key is the same as the Equal key on some calculators.)

III. Addition problems

A. Use home row — 4, 5, and 6

(1)	564	(2)	455	(3)	656
	446		565		666
	645		456		464
	546		444		446

JOB SHEET #2

B. Use home row and top row — 7, 8, and 9

(1)	744	(2)	479	(3)	555
	576		565		879
	879		944		658
	655		789		765

C. Use home row keys and bottom row — 1, 2, 3, and 0

(1)	124	(2)	600	(3)	530
	233		451		104
	112		322		455
	201		115		616

D. Use all rows

(1)	536	(2)	689	(3)	414
	478		901		200
	903		314		608
	214		768		976

BUSINESS MACHINES
UNIT II

JOB SHEET #3 — ADD AND SUBTRACT ON AN ELECTRONIC CALCULATOR

I. Equipment needed — Electronic calculator

(NOTE: Electronic calculators differ in the procedure for entering and subtracting problems. Refer to the operator's manual for your machine to learn the correct subtraction procedure for your model.)

II. Procedure

- A. Turn on the machine

  (NOTE: Clear the calculator if it is already on.)

- B. Set decimal selector to handle dollars and cents
- C. Place fingers in home row position
- D. Follow procedure as directed in your operator's manual
- E. Record answers for each problem

III. Problems

A. Addition

(1)
.79
.59
2.39
1.49
.49

(2)
2.00
3.50
2.95
6.49
3.69

(3)
12.95
19.95
12.00
4.99
6.49

(4)
119.00
239.00
99.99
69.50
16.95

(5)
1.119.00
2,300.00
489.00
69.95
168.00

(6)
13,432.95
7,119.00
239.00
458.00
15.50

JOB SHEET #3

(7)	6,789.00 3,762.13 37.44 563.04 95.33	(8)	475.00 219.75 49.85 107.35 67.18	(9)	12.15 34.10 24.75 3.18 117.65

B. Subtraction

(1)	36.86 – 17.32	(2)	6,893.98 – 468.66	(3)	86,357.73 – 9,432.51
(4)	16,895.40 – 7,338.70	(5)	747.44 – 374.77	(6)	1,632.19 – 918.76
(7)	138,499.18 – 17,643.61	(8)	22,222.22 – 13,491.33	(9)	6,399.95 – 6,136.95

BUSINESS MACHINES
UNIT II

JOB SHEET #4 — MULTIPLY AND DIVIDE ON AN ELECTRONIC CALCULATOR

I. Equipment needed — Electronic calculator

(NOTE: Electronic calculators differ in the procedure for entering and multiplying problems. Refer to the operator's manual for your machine to learn the correct multiplication procedure for your model.)

II. Procedure

A. Turn on the machine

(NOTE: Clear the calculator if it is already on.)

B. Set decimal selector as appropriate

C. Place fingers in home row position

D. Follow procedure as directed in operator's manual

E. Record answers for each problem

III. Problems

A. Multiplication

(NOTE: Set decimal selector at 3.)

(1)	10 x 7	(2)	350 x 15	(3)	1.25 x 25	(4)	2.69 x 10
(5)	19.95 x 6	(6)	680 x .12	(7)	749 x .20	(8)	1,119.75 x 4
(9)	65 x .25	(10)	5.95 x .4	(11)	78.00 x 5	(12)	837 x .16

JOB SHEET #4

B. Division

(NOTE: Set decimal selector at 2.)

(1) 125 ÷ 5 =

(2) 650 ÷ 8 =

(3) 1,495 ÷ 5 =

(4) 6,738 ÷ 16 =

(5) 3,280 ÷ 9 =

(6) 12,500 ÷ 12 =

(7) 1,000 ÷ 6 =

(8) 466 ÷ 7 =

(9) 88 ÷ 11 =

(10) 3,333 ÷ 3 =

(11) 46,577 ÷ 12 =

(12) 15.5 ÷ 5 =

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BUSINESS MACHINES
UNIT II

JOB SHEET #5 — USE AN ELECTRONIC CALCULATOR TO FIGURE PERCENTAGES

I. Equipment needed — Electronic calculator

II. Procedure

- A. Turn on the machine

  (NOTE: Clear the calculator if it is already on.)

- B. Set the decimal selector at 2
- C. Place fingers in home row position
- D. Index original amount
- E. Depress Multiplication key
- F. Index percent
- G. Depress Percent key
- H. Depress Equal key

  (NOTE: Some calculators automatically show the percent amount after the percent key is depressed.)

- I. Record answers for each problem

III. Problems

- A. 25% of 1,000 =
- B. 16% of 750 =
- C. 4% of 176.85 =
- D. 33% of 2,220 =
- E. 66% of 14,389 =
- F. 10% of 1,830 =
- G. 6% of 247.95 =
- H. 5% of 3,016.49 =
- I. 42% of 4.78 =
- J. 70% of 66 =
- K. 18% of 2,500 =
- L. 3% of 130 =

BUSINESS MACHINES
UNIT II

JOB SHEET #6 — USE AN ELECTRONIC CALCULATOR TO FIGURE DISCOUNTS

I. Equipment needed — Electronic calculator

II. Procedure

   A. Turn on the machine

      (NOTE: Clear the calculator if it is already on.)

   B. Set the decimal selector at 2

   C. Find the percent amount using the procedure in Job Sheet #5

      (NOTE: This is the discount amount.)

   D. Index original amount

   E. Subtract discount from original amount using the procedure for subtraction in Job Sheet #3)

      (NOTE: Some calculators will automatically subtract a percentage which is to be discounted. Refer to the operator's manual for your machine to see if it has this feature.)

   F. Depress Equal key

      (NOTE: This is the next amount.)

   G. Record answers for each problem

JOB SHEET #6

III. Problems

		Amount of Discount	Sale (Net) Price
A.	$79.00 less 15%		
B.	$135.00 less 7%		
C.	$1,500.00 less 12%		
D.	$250.00 less 6%		
E.	$1,718.00 less 8%		
F.	$2,735.00 less 13%		
G.	$749.00 less 2%		
H.	$43.00 less 10%		
I.	$618.00 less 5%		
J.	$1,280.00 less 4%		
K.	$906.00 less 50%		
L.	$15,456.00 less 20%		

BUSINESS MACHINES
UNIT II

ANSWERS TO JOB SHEETS

Job Sheet #1 — Performance skills evaluated to the satisfaction of the instructor

Job Sheet #2

A.	1.	2201	B.	1.	2854	C.	1.	670	D.	1.	2131
	2.	1920		2.	2777		2.	1488		2.	2672
	3.	2232		3.	2857		3.	1705		3.	2198

Job Sheet #3

A.	1.	5.75	B.	1.	19.54
	2.	18.63		2.	6425.32
	3.	56.38		3.	76,925.22
	4.	544.44		4.	9556.70
	5.	4145.95		5.	372.67
	6.	21,264.45		6.	713.43
	7.	11,246.94		7.	120,855.57
	8.	919.13		8.	8730.89
	9.	191.83		9.	263.00

Job Sheet #4

A.	1.	70	B.	1.	1.25
	2.	5250		2.	81.25
	3.	31.25		3.	299
	4.	26.90		4.	421.125
	5.	119.70		5.	364.44
	6.	81.60		6.	1041.67
	7.	149.80		7.	166.67
	8.	41479.00		8.	66.57
	9.	16.25		9.	8
	10.	2.38		10.	1111
	11.	390		11.	3881.42
	12.	133.92		12.	3.1

Job Sheet #5

a.	250	g.	14.88
b.	120	h.	150.83
c.	7.07	i.	2.01
d.	732.60	j.	46.20
e.	9496.74	k.	450.00
f.	183.00	l.	3.90

ANSWERS TO JOB SHEETS

Job Sheet #6

	Amount of of Discount	Sale (Net) Price
a.	11.85	67.15
b.	9.45	125.55
c.	180.00	1320.00
d.	15.00	235.00
e.	137.44	1580.56
f.	355.55	2379.45
g.	14.98	734.02
h.	4.30	38.70
i.	30.90	587.10
j.	51.20	1228.80
k.	453.00	453.00
l.	3091.20	12,364.80

BUSINESS MACHINES
UNIT II

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. Sheet of microfilm containing rows of microimages of pages of printed matter

_____b. Machine used to add several figures together to provide a total amount

_____c. Operating a cash register using specific finger positions for faster speed, rhythm, and accuracy

_____d. Device used for performing mathematical calculations electronically

_____e. Set of numbers printed on a package to identify particular product, manufacturer, and price information when scanned by a point-of-sale cash register system

_____f. Machine which magnifies microimages and projects them on a screen so that printed matter is easy to read

_____g. Amount of money placed in cash register for use during the day

_____h. Instrument that reads information from the Universal Product Code; held in the checker's hand or built into the countertop

_____i. Small but complete computer system capable of accepting information, applying processes to information and data, and supplying results of these processes

1. Cash register
2. Microcomputer
3. Change bank
4. Microfiche reader
5. Ten-key adding machine
6. Scanner
7. Touch method
8. Electronic calculator
9. Microfiche card

TEST

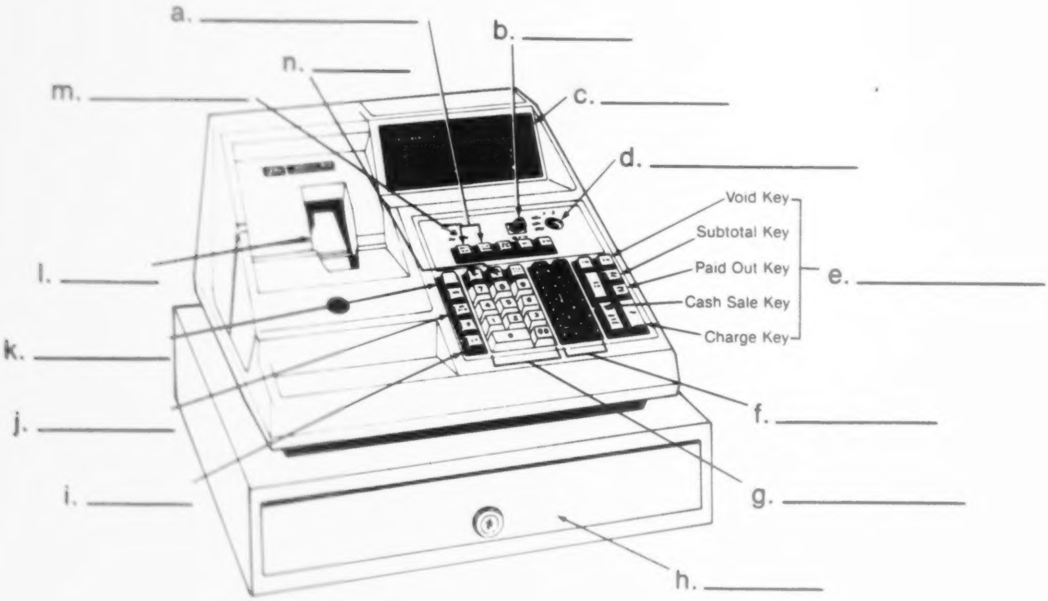
_____j. Electronic cash register system wired to a computer which provides additional information on the sales receipt; records sales, changes in inventory, and cash supply in the accounting office

_____k. Machine which indicates the amount of each sale and records the amount of money received; usually has a change drawer and may automatically make change

10. Point-of-sale system

11. Universal Product Code

2. Identify parts of a cash register.



3. Complete the following list of statements concerning cash drawer arrangement.

a. Place all bills facing ____________________ to prevent mistakes and to save time arranging the money to send to the bank

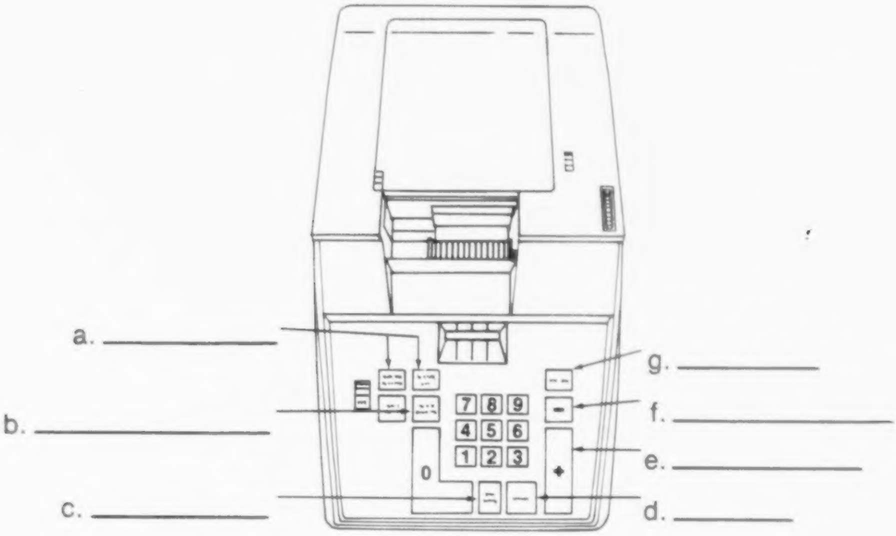
b. Arrange the money from right to left with the ____________________ ____________________ and ____________________ on the right

c. Keep checks, coupons, and large bills tied together with a rubber band or paper clip and place them ____________________

d. ____________________ new bills so they will not stick together

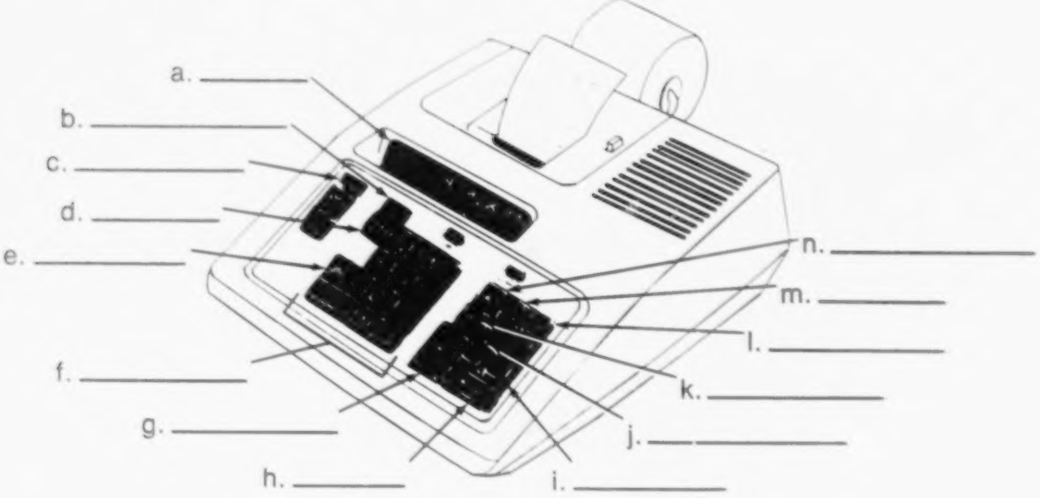
TEST

4. Identify parts of a ten-key adding machine.


a. ____________
b. ____________
c. ____________
d. ____________
e. ____________
f. ____________
g. ____________
7
8
9
4
5
6
1
2
3
0
+

TEST

5. Identify parts of an electronic calculator.



6. Match major microcomputer components on the right with their functions.

_____a.	Displays output	1. Keyboard
_____b.	Reads and/or writes data on floppy diskette	2. Monitor
_____c.	Outputs data onto paper	3. Processor
_____d.	Used to input data into the system	4. Disk drive(s)
_____e.	Processes data which is fed into the system	5. Printer

7. List three general uses of the microcomputer.

a. ____

b. ____

c. ____

TEST

8. Complete the following list of statements concerning the microfiche system and how to use it.

    a. Catalog pages are reduced and put in rows of microimages on ____________________

    b. Since these images are too small to read with the naked eye, microfiche readers are used to ____________________ and project them onto a viewing screen

    c. The microfiche cards are labeled according to year, model, and ____________________ shown on each card

    d. When a customer gives the necessary information to look up a part, simply locate the corresponding card and place it in the reader

    e. Find appropriate ____________________ and ____________________ for part needed

    f. Choose correct ____________________

9. List three reasons for checking daily cash balance.

    a. ____

    ____

    b. ____

    ____

    c. ____

    ____

10. Complete the following list of statements concerning the procedure for checking daily cash balance.

    a. ____

    b. Add all cash and checks taken in during the day

    c. ____

        1) Any cash paid out to freight or similar expenses

        2) Bank deposits

    d. This equals the new cash balance

TEST

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

11. Identify major components of a microcomputer system.

12. Count change.

13. Balance a cash box or cash register.

14. Figure sales tax and total amount of sale using an electronic calculator.

15. Demonstrate the ability to:

    a. Use a cash register.

    b. Use an electronic calculator.

    c. Add and subtract on an electronic calculator.

    d. Multiply and divide on an electronic calculator.

    e. Use an electronic calculator to figure percentages.

    f. Use an electronic calculator to figure discounts.

BUSINESS MACHINES
UNIT II

ANSWERS TO TEST

1. a. 9
   b. 5
   c. 7
   d. 8
   e. 11
   f. 4
   g. 3
   h. 6
   i. 2
   j. 10
   k. 1

2. a. Receipt/journal feed
   b. Clerk key
   c. Front display
   d. Register on/off key
   e. Classification keys
   f. Department keys
   g. Number on amount keys
   h. Cash drawer
   i. Clear key
   j. No sale key
   k. Decimal key
   l. Receipt key
   m. Receipt on/off switch
   n. Tax keys

3. a. The same way
   b. Smaller bills, coins
   c. Under the cash drawer
   d. Wrinkle

4. a. Repeat keys
   b. Correction (clear) key
   c. Subtotal key
   d. Total key
   e. Plus (motor) bar
   f. Subtraction (minus) key
   g. Non-add key

5. a. Display
   b. Clear error key
   c. On/off switch
   d. Clear key
   e. Decimal key
   f. Number keys
   g. Addition key
   h. Total key
   i. Subtotal key
   j. Multiplication key
   k. Subtraction key
   l. Percentage key
   m. Division key
   n. Number/date key

6. a. 2
   b. 4
   c. 5
   d. 1
   e. 3

7. a. Accounting
   b. Data processing
   c. Word processing

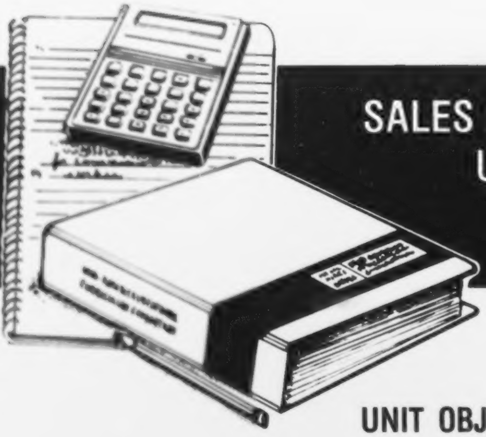
ANSWERS TO TEST

8. a. Microfiche cards
   b. Magnify the images
   c. Types of parts
   e. Grouping, page
   f. Part number

9. a. Check on money that might be lost or misplaced
   b. Check on mistakes that might be made in making change or writing sales slips
   c. Check on money that might be taken from the cash drawer and not accounted for

10. a. Count cash and checks on hand at the beginning of the day
    c. Subtract any money taken out during the day

11.-15. Evaluated to the satisfaction of the instructor



SALES PROCEDURES
UNIT III

UNIT OBJECTIVE

After completion of this unit, the student should be able to list steps in using a tax table, select characteristics of a good check, and explain methods of money manipulation. The student should also be able to prepare sales tickets with discounts, accept cash for merchandise, and process a credit card sale. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment and job sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to sales procedures with their correct definitions.
2. Complete a list of reasons for writing a sales ticket.
3. Select true statements concerning preparing and handling a sales ticket.
4. List the three steps in using a tax table.
5. Select true statements concerning procedures for counting change.
6. Select characteristics of a good check.
7. Select true statements concerning general rules for cashing checks.
8. Complete a list of statements concerning credit card authorization.
9. Match common denominations with their pictures.
10. List ways to detect counterfeit bills.
11. Complete a list of statements concerning how to report counterfeit money.
12. Select true statements concerning common practices of a shortchange artist.

OBJECTIVE SHEET

13. Circle the words which best complete statements concerning ways to avoid the shortchange artist.
14. Explain methods of money manipulation.
15. Complete a list of ways to prevent money manipulation.
16. Complete a worksheet on writing sales tickets.
17. Prepare sales tickets with discounts.
18. Complete a worksheet on accepting checks.
19. Demonstrate the ability to:
    a. Accept cash for merchandise.
    b. Process a credit card sale.

SALES PROCEDURES
UNIT III

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information, assignment, and job sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Discuss and demonstrate the procedures outlined in the job sheets.

VII. Provide students with play money and sample sales tickets to complete Job Sheet #1.

VIII. Provide sample sales tickets for students to practice writing.

IX. Provide students with copies of the local tax table if different from one provided in unit.

X. Obtain a copy of a "hotsheet" to show students how to check for stolen credit cards.

XI. Invite a guest speaker from the Federal Bureau of Investigation or a local bank to discuss counterfeiting and how bad money is passed.

XII. Provide a credit card machine, credit card, and appropriate forms to complete Job Sheet #2.

XIII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Good Sales Ticket

    2. TM 2 — Sales Ticket with Discounts

INSTRUCTIONAL MATERIALS

D. Assignment sheets

   1. Assignment Sheet #1 — Complete a Worksheet on Writing Sales Tickets

   2. Assignment Sheet #2 — Prepare Sales Tickets with Discounts

   3. Assignment Sheet #3 — Complete a Worksheet on Accepting Checks

E. Answers to assignment sheets

F. Job sheets

   1. Job Sheet #1 — Accept Cash for Merchandise

   2. Job Sheet #2 — Process a Credit Card Sale

G. Test

H. Answers to test

II. References:

A. Carlile, Robert. *Agriculture Sales and Service.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

B. Plank, Harry. *Agricultural Business Procedures and Records.* Columbus, OH: Ohio Agricultural Education Curriculum Materials Service, 1976.

C. Nelson, Frank W. *Distributive Education II.* Stillwater, OK: Curriculum and Instructional Materials Center, 1976.

SALES PROCEDURES
UNIT III

INFORMATION SHEET

I. **Terms and definitions**

A. Bulk discount — Discount given for buying in large amounts

(NOTE: Bulk items are usually not packaged individually.)

B. Cash discount — Discount given for paying cash for merchandise

(NOTE: This discount is usually no larger than two or three percent and is figured after other discounts have been applied.)

C. Counterfeit bill — Money made by an individual but not approved by the U.S. government

D. Credit card — A card allowing a customer to charge or delay payment on purchases made

E. Denomination — Value or size of a piece of money

F. Early season discount — Discount for buying merchandise before season

G. Extension — Amount indicated in last column of a sales ticket; it may be the unit price of a single item or the combined cost figured by multiplying quantity times unit price

Example:	Quantity	Item Desc.	Price	Amount
	5	Baler twine	30.00	150.00

5 × 30.00 = $150.00

H. Manipulate — To handle by an artful or unfair method to deceive

I. Personal check — Check given by a customer to pay for merchandise

J. Quantity discount — Discount given for buying large volumes of merchandise

(NOTE: This discount is usually for feed, fertilizer, seed, oil, and fuel.)

K. Sales tax — A certain percent of the total bill

INFORMATION SHEET

- L. Sales ticket — List of merchandise sold, stating customer's name and address, items, quantity, price, tax, and terms of sale; used as a permanent record for customer and business
- M. Serial numbers — Numbers on denominations of paper money which identifies them
- N. Shortchange artist — A person who is an expert in cheating the cashier by confusion and distraction

II. Reasons for writing a sales ticket

- A. Provides a permanent record of each sale
- B. Provides business with necessary information for
  - 1. Inventory records
  - 2. Sales tax reports
  - 3. Customer accounts
- C. Aids in making refunds and exchanges
- D. Signed sales ticket by customer serves as a legal agreement to pay debt
- E. Provides record of customer's expenses for a year

III. Preparing and handling a sales ticket (Transparencies 1 and 2)

- A. Mark the correct date
- B. Write the customer's correct name and address

  (NOTE: If partnership, it should be noted as such. The name and address becomes necessary if the purchase becomes a charge account.)
- C. Give a complete description of each article sold
  - 1. Quantity and unit should be thought of as one item

    Examples: 100 lbs., 10 gal.
  - 2. The description should clearly designate the type of merchandise being sold and not merely be a commodity classification

    Example: 100# calf manna, not 100# feed. This is necessary for checking price for inventory controls.

INFORMATION SHEET

3. Show the price per unit on all merchandise

   (NOTE: Some sales tickets will have a column heading marked "price." Bill all merchandise at the retail price. If the customer is entitled to a discount because of volume or damage, this amount is then deducted from the retail price.)

4. Extensions must be mathematically accurate and legibly written

D. Make a subtotal of the extension

E. Calculate the sales tax on all taxable items, if any, and enter under the first total

F. Calculate any delivery, mixing, grinding, or shelling charges and enter under the sales tax calculations

G. Add the extension column to obtain the grand total charges for the sale

H. Check the block on the ticket to indicate the method of payment: cash, check, charge, returned, or account

I. If settlement is to be made by check in an amount different from the ticket total, it is well to note the amount of the check on the face of the sales ticket with the calculation of the charge to be given

(NOTE: A similar calculation is recommended when a large bill is given in payment.)

J. Get the signature of the person receiving the merchandise if the settlement is to be other than cash

K. When a customer pays on account, make out a sales ticket and mark what the customer is paying for

Examples: Fertilizer, feed, balance on note

L. In all cases, if an employee should ruin a ticket for any reason, the word VOID should be written across the front of the ticket and the original placed with the other tickets

(NOTE: Sales tickets are numbered consecutively and each one must be accounted for at the end of the day's business.)

M. Salesclerk initials the ticket in the appropriate block

N. Give customer carbon copy of sales ticket at time of purchase

INFORMATION SHEET

O. File the original copy of sales ticket as a permanent record of sales and all other transactions

P. One carbon copy may be a delivery copy to go along with merchandise in case it is delivered

(NOTE: This copy may also be used by customer to pick up purchased items at dock.)

Q. One carbon copy may be filed as a patronage record for members of a cooperative

IV. **Steps in using a tax table**

A. Total the customer's bill

INFORMATION SHEET

B. Find this amount on the tax table

(NOTE: The amount of tax to charge is in the right column next to the total amount. The tax table below is based on 4% sales tax.)

Amount of Sale	Tax	Amount of Sale	Tax	Amount of Sale	Tax
.01 - .12	.00	14.88 - 15.12	.60	29.88 - 30.12	1.20
.13 - .37	.01	15.13 - 15.37	.61	30.13 - 30.37	1.21
.38 - .62	.02	15.38 - 15.62	.62	30.38 - 30.62	1.22
.63 - .87	.03	15.63 - 15.87	.63	30.63 - 30.87	1.23
.88 - 1.12	.04	15.88 - 16.12	.64	30.88 - 31.12	1.24
1.13 - 1.37	.05	16.13 - 16.37	.65	31.13 - 31.37	1.25
1.38 - 1.62	.06	16.38 - 16.62	.66	31.38 - 31.62	1.26
1.63 - 1.87	.07	16.63 - 16.87	.67	31.63 - 31.87	1.27
1.88 - 2.12	.08	16.88 - 17.12	.68	31.88 - 32.12	1.28
2.13 - 2.37	.09	17.13 - 17.37	.69	32.13 - 32.37	1.29
2.38 - 2.62	.10	17.38 - 17.62	.70	32.38 - 32.62	1.30
2.63 - 2.87	.11	17.63 - 17.87	.71	32.63 - 32.87	1.31
2.88 - 3.12	.12	17.88 - 18.12	.72	32.88 - 33.12	1.32
3.13 - 3.37	.13	18.13 - 18.37	.73	33.13 - 33.37	1.33
3.38 - 3.62	.14	18.38 - 18.62	.74	33.38 - 33.62	1.34
3.63 - 3.87	.15	18.63 - 18.87	.75	33.63 - 33.87	1.35
3.88 - 4.12	.16	18.88 - 19.12	.76	33.88 - 34.12	1.36
4.13 - 4.37	.17	19.13 - 19.37	.77	34.13 - 34.37	1.37
4.38 - 4.62	.18	19.38 - 19.62	.78	34.38 - 34.62	1.38
4.63 - 4.87	.19	19.63 - 19.87	.79	34.63 - 34.87	1.39
4.88 - 5.12	.20	19.88 - 20.12	.80	34.88 - 35.12	1.40
5.13 - 5.37	.21	20.13 - 20.37	.81	35.13 - 35.37	1.41
5.38 - 5.62	.22	20.38 - 20.62	.82	35.38 - 35.62	1.42
5.63 - 5.87	.23	20.63 - 20.87	.83	35.63 - 35.87	1.43
5.88 - 6.12	.24	20.88 - 21.12	.84	35.88 - 36.12	1.44
6.13 - 6.37	.25	21.13 - 21.37	.85	36.13 - 36.37	1.45
6.38 - 6.62	.26	21.38 - 21.62	.86	36.38 - 36.62	1.46
6.63 - 6.87	.27	21.63 - 21.87	.87	36.63 - 36.87	1.47
6.88 - 7.12	.28	21.88 - 22.12	.88	36.88 - 37.12	1.48
7.13 - 7.37	.29	22.13 - 22.37	.89	37.13 - 37.37	1.49
7.38 - 7.62	.30	22.38 - 22.62	.90	37.38 - 37.62	1.50
7.63 - 7.87	.31	22.63 - 22.87	.91	37.63 - 37.87	1.51
7.88 - 8.12	.32	22.88 - 23.12	.92	37.88 - 38.12	1.52
8.13 - 8.37	.33	23.13 - 23.37	.93	38.13 - 38.37	1.53
8.38 - 8.62	.34	23.38 - 23.62	.94	38.38 - 38.62	1.54
8.63 - 8.87	.35	23.63 - 23.87	.95	38.63 - 38.87	1.55
8.88 - 9.12	.36	23.88 - 24.12	.96	38.88 - 39.12	1.56
9.13 - 9.37	.37	24.13 - 24.37	.97	39.13 - 39.37	1.57
9.38 - 9.62	.38	24.38 - 24.62	.98	39.38 - 39.62	1.58
9.63 - 9.87	.39	24.63 - 24.87	.99	39.63 - 39.87	1.59
9.88 - 10.12	.40	24.88 - 25.12	1.00	39.88 - 40.12	1.60
10.13 - 10.37	.41	25.13 - 25.37	1.01	40.13 - 40.37	1.61
10.38 - 10.62	.42	25.38 - 25.62	1.02	40.38 - 40.62	1.62
10.63 - 10.87	.43	25.63 - 25.87	1.03	40.63 - 40.87	1.63
10.88 - 11.12	.44	25.88 - 26.12	1.04	40.88 - 41.12	1.64
11.13 - 11.37	.45	26.13 - 26.37	1.05	41.13 - 41.37	1.65
11.38 - 11.62	.46	26.38 - 26.62	1.06	41.38 - 41.62	1.66
11.63 - 11.87	.47	26.63 - 26.87	1.07	41.63 - 41.87	1.67
11.88 - 12.12	.48	26.88 - 27.12	1.08	41.88 - 42.12	1.68
12.13 - 12.37	.49	27.13 - 27.37	1.09	42.13 - 42.37	1.69
12.38 - 12.62	.50	27.38 - 27.62	1.10	42.38 - 42.62	1.70
12.63 - 12.87	.51	27.63 - 27.87	1.11	42.63 - 42.87	1.71
12.88 - 13.12	.52	27.88 - 28.12	1.12	42.88 - 43.12	1.72
13.13 - 13.37	.53	28.13 - 28.37	1.13	43.13 - 43.37	1.73
13.38 - 13.62	.54	28.38 - 28.62	1.14	43.38 - 43.62	1.74
13.63 - 13.87	.55	28.63 - 28.87	1.15	43.63 - 43.87	1.75
13.88 - 14.12	.56	28.88 - 29.12	1.16	43.88 - 44.12	1.76
14.13 - 14.37	.57	29.13 - 29.37	1.17	44.13 - 44.37	1.77
14.38 - 14.62	.58	29.38 - 29.62	1.18	44.38 - 44.62	1.78
14.63 - 14.87	.59	29.63 - 29.87	1.19	44.63 - 44.87	1.79

C. Add amount on tax table to subtotal for total amount due

Example:			
	Subtotal	—	$40.00
	Sales tax	—	$ 1.60
	Total amount due	—	$41.60

INFORMATION SHEET

V. **Counting change**

A. Without an automatic change dispenser

1. Place the money received on the coin slab while making change

2. Make change with the least number of coins and bills

   Example: Instead of two dimes and a nickel, give the customer a quarter; instead of seven ones, give the customer a five dollar bill and a two dollar bill or a five dollar bill and two ones.

3. Repeat the amount of the sale and the amount of money received by the customer

4. Count the money to yourself as it is taken from the cash drawer and then again back to the customer

5. Do not add or subtract, simply begin with the smallest amount and count back to the amount given by the customer

   Example: If the customer owes $2.87 and gives you a ten dollar bill you would say, "That will be two eighty-seven out of ten. Two eighty-seven, two eighty-eight, two eighty-nine, two ninety, three dollars, four, five, and five dollars makes ten. Okay? Thank you."

6. Mention each new dollar denomination throughout to avoid making mistakes

   Example: "That will be two eighty-seven out of ten. Two eighty-seven, two eighty-eight, two eight-nine, two ninety, three dollars, four, five, and five dollars makes ten. Correct? Thank you."

7. Count each coin and bill separately

   Example: Do not lump all pennies together but count each one separately. Lumping change together does not save time because most customers will take time to count the change anyway

INFORMATION SHEET

8. Subtract any additional change given by the customer and begin counting back from that amount

   Example: If the customer owes $2.87 and gives you $5.87, you would count back by saying, "Two dollars, three, four, and five dollars." If the customer owes $2.35 and gives you $5.50, you would reply, "Thirty-five cents out of fifty cents — thirty-five, forty-five, fifty, and two dollars out of five — two dollars, three, four, and five dollars. Right? Thank you."

9. Start over if interrupted or politely ask the customer to wait until the transaction is completed

10. Count the change directly into the customer's hand whenever possible

11. Never argue or accuse a customer of cheating

12. Cash checks for other than the exact amount before receiving payment for goods and services

B. With an automatic change dispenser

1. Record both the amount of the sale and the amount received on the cash register or change-making machine

2. Repeat the amount of the purchase and the amount of money received when the money is placed on the coin slab and again as the amount of money received is punched into the machine

   Example: "$21.50 out of $30.00."

3. State the amount of change when the amount is indicated on the machine

   Example: "Your correct change is $8.50"

4. Take the number of bills and then the amount of change from the cash drawer

   (NOTE: Some machines dispense the coins automatically. Thus, the customer picks up his/her coins without having them counted back. The cashier should remind the customer to pick up his/her change.)

INFORMATION SHEET

5. Count the change to the customer starting with the largest bills and ending with the smallest coins

   Example: "Your change will be $8.50. Five dollars, six, seven, and eight dollars. And your change is in the dispenser. Correct? Thank you."

   (NOTE: The last two steps are the opposite of counting change without an automatic dispenser.)

VI. **Characteristics of a good check**

A. Check should be written in ink

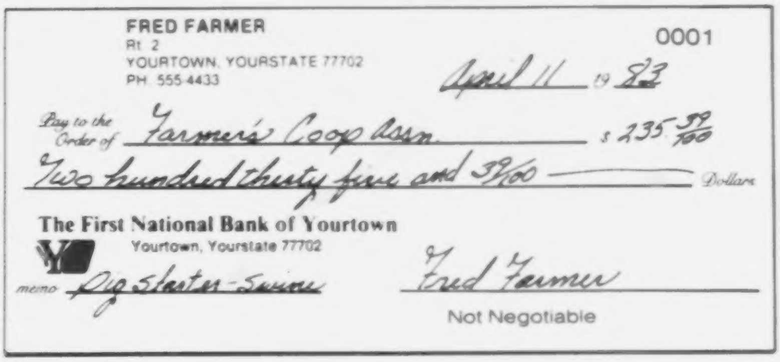
B. Check should be properly dated

C. Check should be properly signed

D. Address and phone number of customer should appear on check

E. Amount of check should be clearly written in numbers and words

Example:



FRED FARMER
Rt 2
YOURTOWN, YOURSTATE 77702
PH 555-4433

0001

April 11 19 83

Pay to the Order of Farmer's Coop Assn. $ 235 39/100

Two hundred thirty five and 39/100 Dollars

The First National Bank of Yourtown
Yourtown, Yourstate 77702

memo Pig Starter - Swine

Fred Farmer

Not Negotiable

VII. **General rules for cashing checks**

(NOTE: Check with management to determine policy for cashing checks.)

A. Check the date

B. Check the amount in figures with the written amount

INFORMATION SHEET

C. Have the customer initial any corrections that are made on the check

D. Inspect the signature of the person who signed the check

E. Make sure the check is made payable to appropriate business

F. Do not accept a check marked *"For deposit only"*

G. If the check is not personalized, secure the address of the person cashing the check

H. Do not accept a check without the account number on it or with an altered account number

I. Ask the person writing the check for identification

(NOTE: This is only necessary if the person is not a regular customer. Some businesses require more than one form of identification.)

Examples: Driver's license, major credit card

J. Call the manager if there is some question about the check or if store policy requires that the manager approve each check

K. Initial the check

L. If the check is for the full amount of the order and is approved, treat it as a cash sale

M. Endorse the check immediately either by stamp or by placing it on the cash register printing table

VIII. **Credit card authorization**

(NOTE: Check business policy on accepting credit cards.)

A. Call for sales authorization

1. If the amount of sale is greater than the store limit

2. When a charge card appears on a hotsheet

   (NOTE: If the card is stolen, do not return it to individual and notify management at once.)

3. On all telephone orders over $50.00

INFORMATION SHEET

4. If an individual other than person whose signature appears on card is using the card

   (NOTE: Most authorization centers provide 24-hour service seven days a week.)

B. Tell the operator the cardholder account number, the last six digits of merchant identification number, and amount of the sale

C. Write the authorization number on the draft if approval is granted

(NOTE: Do not complete the credit card transaction if approval is not given.)

IX. Common denominations and their pictures

A. $1 — Washington

B. $2 — Jefferson

C. $5 — Lincoln

D. $10 — Hamilton

E. $20 — Jackson

F. $50 — Grant

G. $100 — Franklin

X. Ways to detect counterfeit bills

A. Hairlines on portraits may blend into the background

B. Points around the colored seal may not be clear and sharp

C. Crisscross lines on the border are often not clear and distinct

D. Serial numbers may be out of line, poorly spaced, or printed too light or dark

E. The color of a bill may be too light or dark

F. Bills will often appear to be too clean, stiff, or thick

G. Compare any unusual bill to another bill of the same denomination

INFORMATION SHEET

XI. **How to report counterfeit money**

A. Inform the supervisor first

B. Write your name and date on the back of the bill for later identification

C. Write down any details you can remember about how you got it, who gave it to you, where you got it, and when you got it

D. Contact the police, U.S. Secret Service, commercial bank, or Federal Reserve bank

E. Do not return the money to the customer if the bills are discovered to be counterfeit

F. Stall the person passing the counterfeit money

G. Avoid arguments because the passer may also be an innocent victim

H. Write down the passer's description and license number if he/she leaves

XII. **Common practices of a shortchange artist**

A. Cheats salesclerk by using confusion or distraction

B. Interrupts the salesclerk while making change and asks for change in a different denomination

C. Rushes the salesclerk to complete sales transaction

Example: The cashier may be given a bill for payment after the change has been returned. The guest may then change a combination of bills and coins to a lesser amount and then ask for his bill to be returned as the lesser change is handed back to the cashier. During the exchange, the cashier is cheated.

XIII. **Ways to avoid the shortchange artist**

A. Ask customer to wait and then finish the transaction to avoid being confused and distracted

B. Have the customer's money in your hand before giving any change even if the customer asks for change several times

C. Always call out clearly the denomination of the bill the customer hands you

D. Record denomination of bill the customer hands you on sales ticket

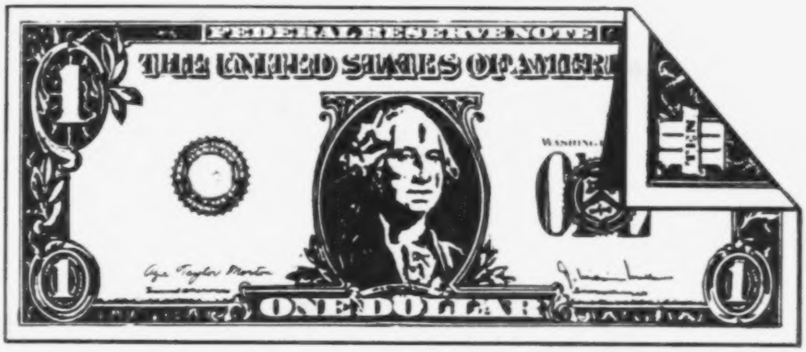
E. Close the cash drawer and contact the manager if total confusion occurs

INFORMATION SHEET

XIV. **Methods of money manipulation**

A. Split bill method — Separating two different bill denominations by a special process, then interchanging the sides of the two bills to create two large denomination bills

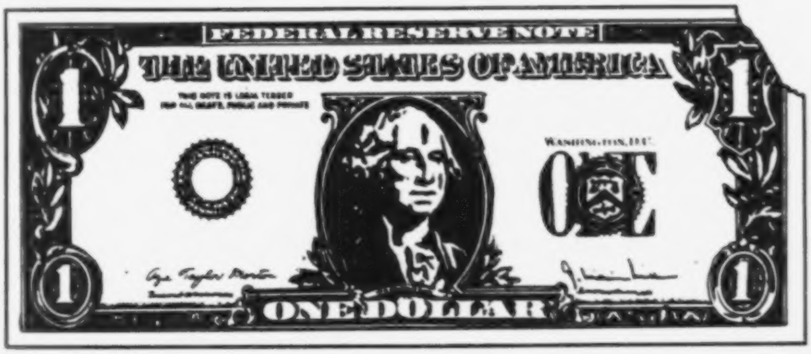
Example: A $1 bill and $10 bill are separated producing two bills, each having a ten side and a one side; the manipulator will pass the two changed bills which were worth $11 for $20 worth of goods



(NOTE: Another method is to cut bills in half and attach the right half of a large bill to the left half of a small bill. The bills are then passed with a stack of the larger bills.)

INFORMATION SHEET

B. Marked bill method — Placing the same identifying marks, such as torn corners or ink spots, on a small and large denomination bill, then changing bills for merchandise by using large bill first, and following later with another purchase using the smaller bill and arguing with the cashier that larger bill was given; individual is able to identify larger bill by mark and salesclerk is manipulated into giving incorrect change



Example: A person buys a roll of twine that costs $1.50 with a $10 bill which is marked by a torn corner in the upper right hand side of the bill. The person receives the change and leaves. The partner then comes along and buys a package of seed that costs 69¢ and pays with a dollar bill and then argues that it was a $10 bill given to the cashier. The manipulator proves it by identifying the torn corner on the bill. The cashier looks into the cash drawer, finds the bill that meets the description, and gives the second manipulator $9 more in change

XV. **Ways to prevent money manipulation**

A. Examine both sides of a bill

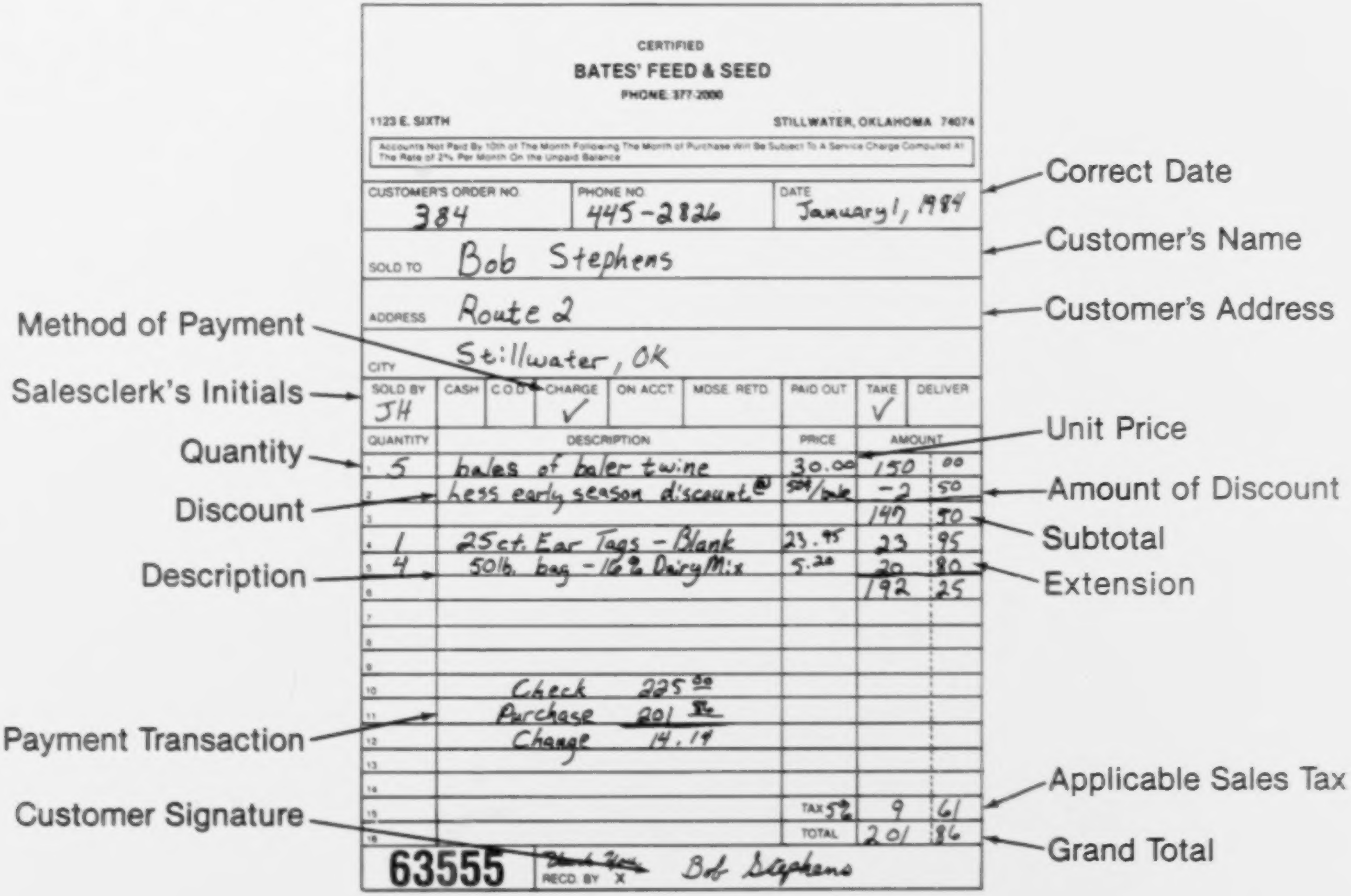
B. Look for unusual markings

C. Casually or humorously let the person know you found a marking on the bill

D. Do not place money in the cash drawer until the customer has indicated correct amount of change was received

E. Place any marked bill under the cash drawer tray

Good Sales Ticket



CERTIFIED
BATES' FEED & SEED
PHONE 377-2000

1123 E. SIXTH
STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO.	PHONE NO.	DATE
384	445-2826	January 1, 1984

SOLD TO Bob Stephens
ADDRESS Route 2
CITY Stillwater, OK

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT	MDSE. RETD.	PAID OUT	TAKE	DELIVER
JH			✓				✓	

	QUANTITY	DESCRIPTION	PRICE	AMOUNT	
1	5	bales of baler twine	30.00	150	00
2		Less early season discount @	50¢/bale	−2	50
3				147	50
4	1	25 ct. Ear Tags – Blank	23.95	23	95
5	4	50 lb. bag – 16% Dairy Mix	5.20	20	80
6				192	25
7					
8					
9					
10		Check 225.50			
11		Purchase 201.86			
12		Change 14.14			
13					
14					
15			TAX 5%	9	61
16			TOTAL	201	86

63555

RECD. BY X Bob Stephens

Correct Date
Customer's Name
Customer's Address
Method of Payment
Salesclerk's Initials
Quantity
Unit Price
Discount
Amount of Discount
Subtotal
Description
Extension
Payment Transaction
Applicable Sales Tax
Customer Signature
Grand Total

Sales Ticket With Discounts

CERTIFIED
BATES' FEED & SEED
PHONE: 377-2000

1123 E. SIXTH
STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance.

CUSTOMER'S ORDER NO.	PHONE NO.	DATE
384	445-2826	March 1, 1984

SOLD TO Bob Stephens

ADDRESS Route 2

CITY Stillwater, OK

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER
JH	✓						✓	

QUANTITY	DESCRIPTION	PRICE	AMOUNT	
20	50# Bags 20% Range Cubes	4.50	90	00
10	Tons 5-20-20 Fertilizer	176.00	1760	00
	Less early season discount $3/ton		-30	00
	Less tonnage discount $4/ton		-40	00
			1690	00
2	tons Commercial Pullet Developer	220^{00}	440	00
	Less bulk discount		-8	00
	Less tonnage discount $1/ton		-2	00
			430	00
	Sub	Total	2210	00
	less 2% cash discount		-44	20
			2165	80
		TAX 5%	108	29
		TOTAL	2274	09

63654	Thank You. RECD. BY X

SALES PROCEDURES
UNIT III

ASSIGNMENT SHEET #1 — COMPLETE A WORKSHEET ON WRITING SALES TICKETS

Directions: Fill out the sample sales tickets for the following situations. Use the sales tax table for your area and the current date. Your salesclerk number is 60.

1. Jane Farmer purchased three hundred pounds of corn at $5.25 per hundred weight and two twelve-ounce boxes of sweet corn seed at $1.49 each. Jane paid cash. Her address is Route 3, (YourTown, YourState), and her customer order number is 986.

CERTIFIED

BATES' FEED & SEED

PHONE: 377-2000

1123 E. SIXTH

STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO.	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

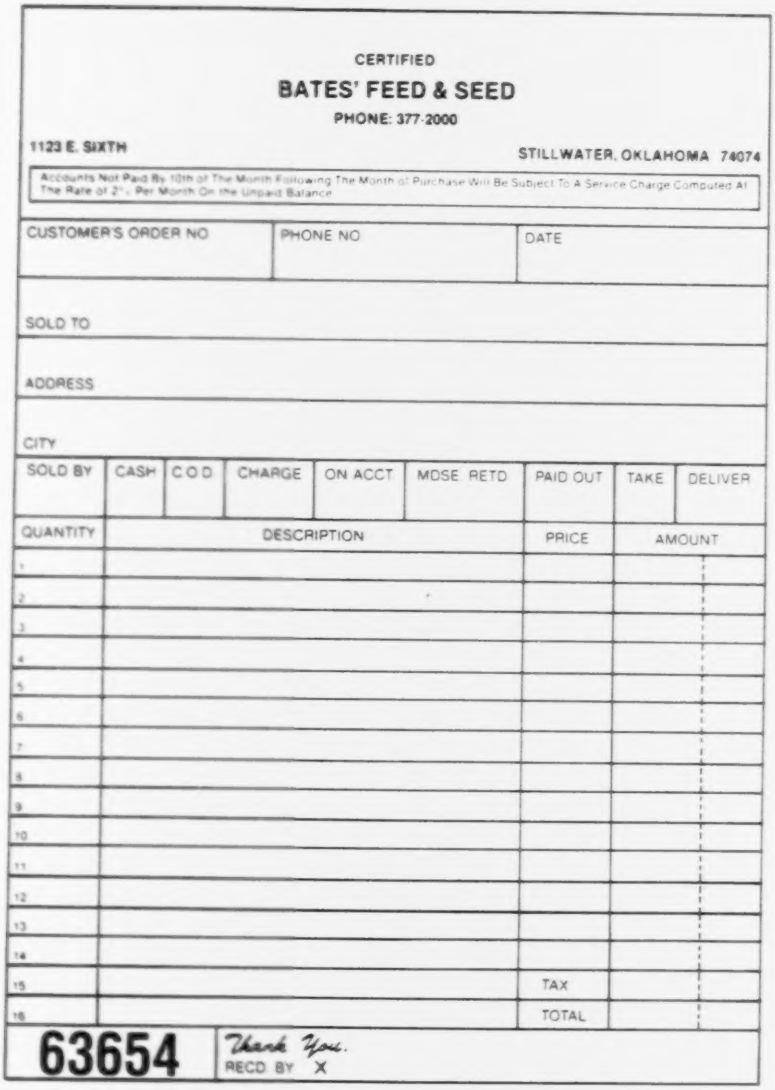
QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654 *Thank You.*

RECD. BY X

ASSIGNMENT SHEET #1

2. Tim Harvester purchased six hundred pounds of fescue seed at 32¢ per pound, three salt blocks at $14.25 per block, and one large cow halter (nylon) at $13.95. He paid with a check and gave his address as Route 1, Box 312, (YourTown, YourState). His customer order number is 987.



CERTIFIED

BATES' FEED & SEED

PHONE: 377-2000

1123 E. SIXTH
STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO	PHONE NO	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT	MDSE. RETD	PAID OUT	TAKE	DELIVER

QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654

Thank You.
RECD. BY X

324

SALES PROCEDURES
UNIT III

ASSIGNMENT SHEET #2 — PREPARE SALES TICKETS WITH DISCOUNTS

Directions: Some businesses give discounts on their sales. Using the information presented below, complete three sales tickets including the customer's discount.

Mr. Bob Blackstone raises cattle, swine and pullets. He sells milo to a local feed mill which uses the milo in their chicken feed. He buys his feed and supplies in Stillwater which has a 4¢ sales tax and Hennesey which has a 5¢ sales tax. Prepare sales tickets for the following dates:

A. Feb. 11 Stillwater — Cash Ticket No. 384

12 tons 18% Pig Starter	$250/ton bulk
200 bags 20% Range Cubes	$4.50/50 lb. bag
20 bushels Alsike Clover	$25/bu.

B. May 23 Stillwater — Charge Ticket No. 1598

15 tons 14 - 14 - 14 Fertilizer	$175.00/ton
3 gallons Spray and Dip	$12.60/gal.

C. July 21 Hennesey — Cash Ticket No. 1700

5 gallons Grub Kill	$13.10/gal.
4 pounds Rat Kill	$1.49/lb.
5 pounds Fly Bait	$1.20/lb.
1 gallon Liquid Wormer	$1.65/pt.
3 quarts Lawn Weed Killer	$3.30/pt.

ASSIGNMENT SHEET #2

With given information, use sales ticket worksheet and complete the different types of discounts.

QUANTITY DISCOUNTS (tonnage)

Fertilizer Discounts:

5 to 10 ton order	$1.00 per ton discount
11 to 15 ton order	3.00 per ton discount
16 tons or over	5.00 per ton discount

Feed Discounts:

1 to 5 ton (plus $4 per ton bulk)	$1.00 per ton discount
6 to 10 ton (plus $6 per ton bulk)	2.00 per ton discount
11 ton or more (plus $8 per ton bulk)	3.00 per ton discount

EARLY SEASON DISCOUNTS

Twine:		Fertilizer:	Seed:
50¢ per bale	December delivery	$3.00 per ton	$2.00 per bu.
40¢ per bale	January delivery	2.50 per ton	1.50 per bu.
30¢ per bale	February delivery	2.00 per ton	1.00 per bu.
20¢ per bale	March delivery	1.50 per ton	—
10¢ per bale	April delivery	—	—

CASH DISCOUNTS

2% cash discounts allowed when payment is made at time of delivery or pickup

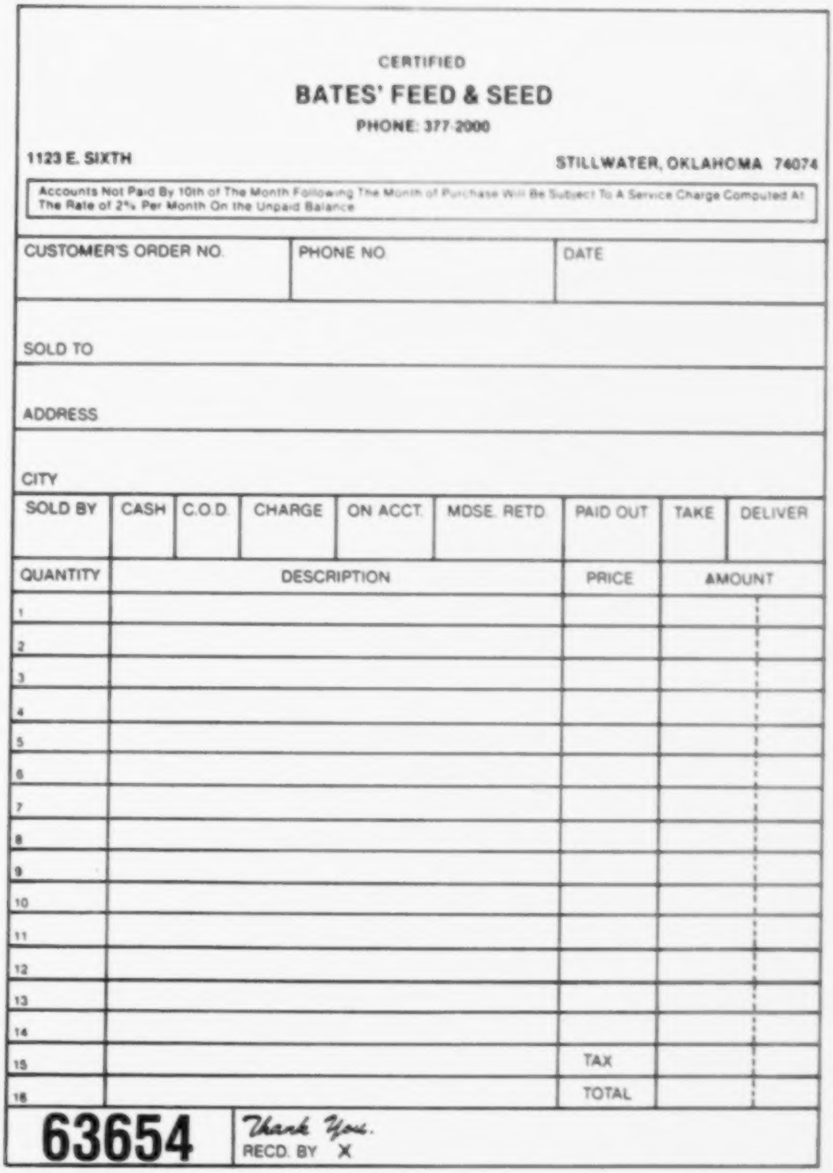
Several discounts may apply on the same sale. It is possible to use tonnage, early order, and cash discount on the same purchase

Deduct early season and tonnage discounts before cash discounts

In figuring fractions of a cent, carry forward 1/2¢ or more and drop less than 1/2¢

ASSIGNMENT SHEET #2

A.



CERTIFIED

BATES' FEED & SEED

PHONE: 377-2000

1123 E. SIXTH

STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO.	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654

Thank You.

RECD. BY X

ASSIGNMENT SHEET #2

B.

CERTIFIED

BATES' FEED & SEED

PHONE: 377-2000

1123 E. SIXTH

STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO.	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

QUANTITY	DESCRIPTION	PRICE	AMOUNT	
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15		TAX		
16		TOTAL		

63654

Thank You.

RECD. BY X

ASSIGNMENT SHEET #2

C.

CERTIFIED

BATES' FEED & SEED

PHONE: 377-2000

1123 E. SIXTH

STILLWATER, OKLAHOMA 74074

Accounts Not Paid By 10th of The Month Following The Month of Purchase Will Be Subject To A Service Charge Computed At The Rate of 2% Per Month On the Unpaid Balance

CUSTOMER'S ORDER NO.	PHONE NO.	DATE

SOLD TO

ADDRESS

CITY

SOLD BY	CASH	C.O.D.	CHARGE	ON ACCT.	MDSE. RETD.	PAID OUT	TAKE	DELIVER

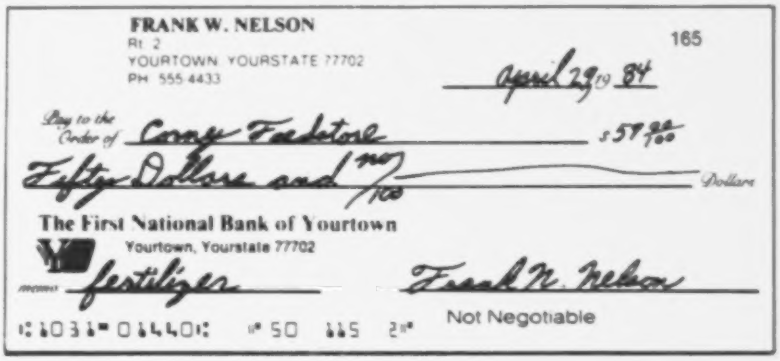
QUANTITY	DESCRIPTION	PRICE	AMOUNT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15		TAX	
16		TOTAL	

63654	*Thank You.* RECD. BY X

SALES PROCEDURES
UNIT III

ASSIGNMENT SHEET #3 — COMPLETE A WORKSHEET ON ACCEPTING CHECKS

Directions: Under each of the following checks, list all the errors you can find. The checks were received on May 2, 1984. It should only take the experienced employee about 10 seconds to look over a check.



FRANK W. NELSON
Rt. 2
YOURTOWN, YOURSTATE 77702
PH. 555-4433

165

April 29 19 84

Pay to the Order of Corey Feedstore $57 00/100

Fifty Dollars and no/100 Dollars

The First National Bank of Yourtown
Yourtown, Yourstate 77702

memo fertilizer

Frank W. Nelson

⑆1031⑆01440⑆ ⑈50 115 2⑈

Not Negotiable

A. ____

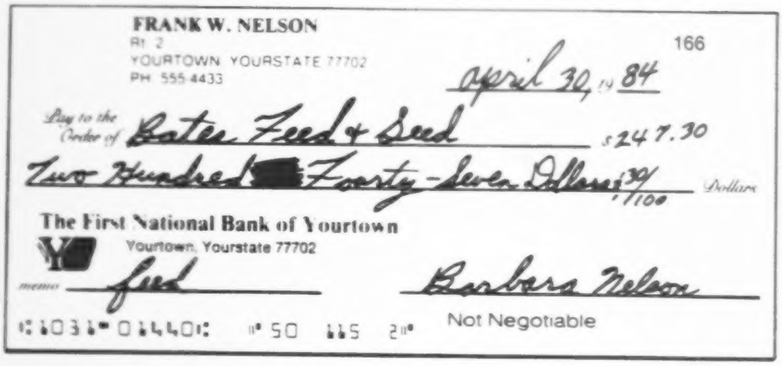
____

____

____

____

ASSIGNMENT SHEET #3



FRANK W. NELSON
Rt. 2
YOURTOWN, YOURSTATE 77702
PH. 555-4433

166

april 30, 19 84

Pay to the Order of Bates Feed & Seed $247.30

Two Hundred [redacted] Forty-Seven Dollars 30/100 Dollars

The First National Bank of Yourtown
Yourtown, Yourstate 77702

memo feed

Barbara Nelson

⑆1031⑉01440⑆ ⑈50 115 2⑈

Not Negotiable

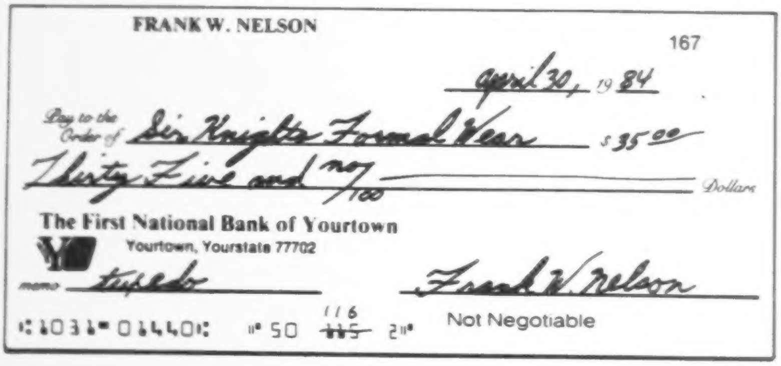
B. ______________________________

____

____

____

____



FRANK W. NELSON

167

april 30, 19 84

Pay to the Order of Sir Knights Formal Wear $35 00

Thirty Five and no/100 Dollars

The First National Bank of Yourtown
Yourtown, Yourstate 77702

memo tuxedo

Frank W. Nelson

⑆1031⑉01440⑆ ⑈50 ~~115~~ 116 2⑈

Not Negotiable

C. ______________________________

____

____

____

____

SALES PROCEDURES
UNIT III

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1 — Evaluated to the satisfaction of the instructor

Assignment Sheet #2 — Evaluated to the satisfaction of the instructor

Assignment Sheet #3

A. Numbered and written amounts on check do not agree (59.00/fifty dollars and no/100). Also, individual has signed Frank N. rather than Frank W. Nelson.

B. Wrong year has been indicated which makes check over a year old and non negotiable, and Barbara Nelson has signed check but account is in Frank W. Nelson's name only.

C. Check should have customer address and phone number, thirty. has been marked through on dollar amount, account number has been altered.

SALES PROCEDURES
UNIT III

JOB SHEET #1 — ACCEPT CASH FOR MERCHANDISE

I. Materials

A. Cash box or change bank

B. Play money in denominations from $1-$20 and assortment of change

C. Sales ticket(s)

D. Customer

II. Procedure

A. Greet customer

Examples: "Hello," "Good morning"

B. Take sales ticket and money

C. Record denomination of bill customer hands you on sales ticket

D. Glance over ticket for possible errors in price or addition

E. Look at customer and state amount of ticket and money

Example: "That will be five forty-six out of ten"

F. Place ticket and money to one side of cash box or drawer

G. Record sale on cash register

H. Count out correct change from box or drawer

(NOTE: A salesclerk should be able to rapidly compute the amount of change without aid of pencil or paper.)

I. Count change back to customer out loud beginning with amount of ticket

Example: "That will be five forty-six, five forty-seven, five forty-eight, five forty-nine, five fifty, six dollars, seven, eight, nine, and ten dollars. Thank you."

J. Hand bills to customer face up

K. Place the money the customer has given in the cash box or drawer

JOB SHEET #1

L. Shut cash box or drawer

M. File sales ticket

N. Thank the customer

O. Notify warehouse, if necessary, for dock pick up

P. Repeat steps A through O using other sales tickets

SALES PROCEDURES
UNIT III

JOB SHEET #2 — PROCESS A CREDIT CARD SALE

I. Materials

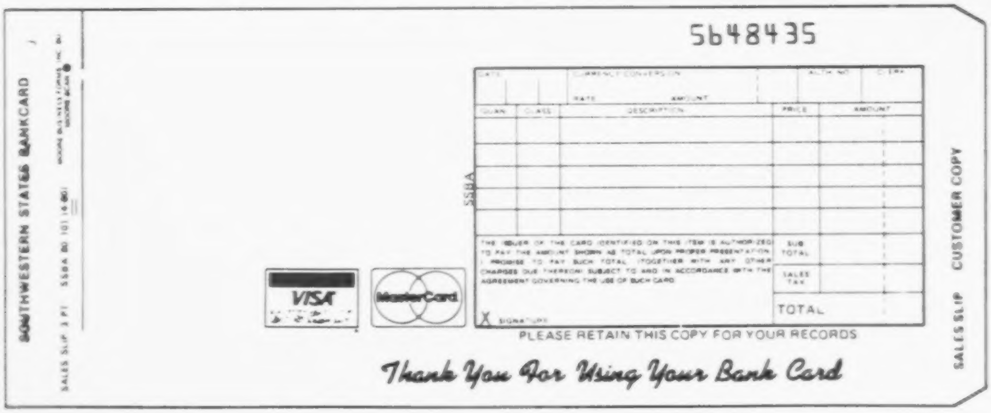
- A. Credit card
- B. Imprinter
- C. Credit card form

II. Procedure

(NOTE: Many agribusinesses do not honor all credit cards. Find out from the manager which credit cards are acceptable. Acceptable credit cards may be displayed on the door or at the cash register.)

- A. Write date of sale on credit card form or set date wheel on imprinter (Figure 1)

FIGURE 1



SOUTHWESTERN STATES BANKCARD

SALES SLIP 3 PT   SSBA 80 101 (6-80)

5648435

DATE	CURRENCY CONVERSION RATE AMOUNT	AUTH. NO.	CLERK

QUAN.	CLASS	DESCRIPTION	PRICE	AMOUNT

THE ISSUER OF THE CARD IDENTIFIED ON THIS ITEM IS AUTHORIZED TO PAY THE AMOUNT SHOWN AS TOTAL UPON PROPER PRESENTATION. I PROMISE TO PAY SUCH TOTAL (TOGETHER WITH ANY OTHER CHARGES DUE THEREON) SUBJECT TO AND IN ACCORDANCE WITH THE AGREEMENT GOVERNING THE USE OF SUCH CARD.

SUB TOTAL

SALES TAX

TOTAL

X SIGNATURE

SSBA

PLEASE RETAIN THIS COPY FOR YOUR RECORDS

Thank You For Using Your Bank Card

SALES SLIP   CUSTOMER COPY

- B. Describe the merchandise on the lines provided
- C. Write in the price of each item
- D. Write in the tax
- E. Total the amounts on the credit card form
- F. Check date of expiration on credit card to insure it is valid

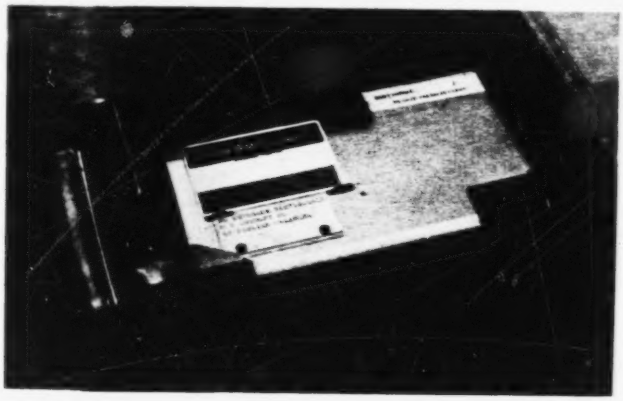
JOB SHEET #2

G. Check card list to make sure credit card is valid

H. Call for sales authorization if necessary

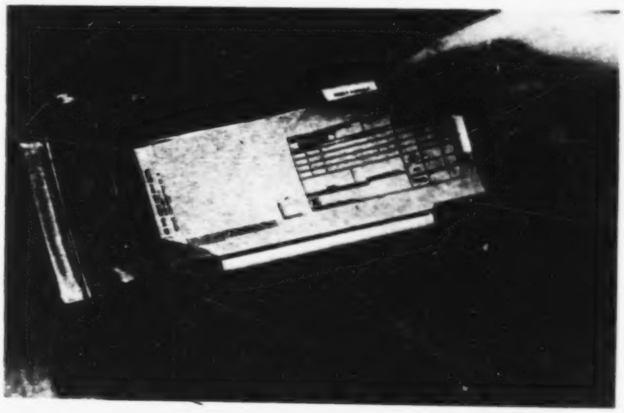
I. Place customer's credit card face up in slots on the machine (Figure 2)

FIGURE 2



J. Place sales slip face up on slots on machine and over face of credit card (Figure 3)

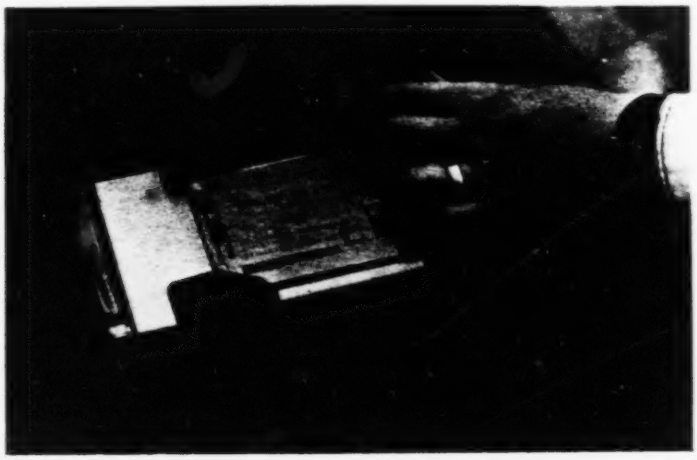
FIGURE 3



JOB SHEET #2

K. Move imprinter handle completely across sales slip and then back to original position (Figure 4)

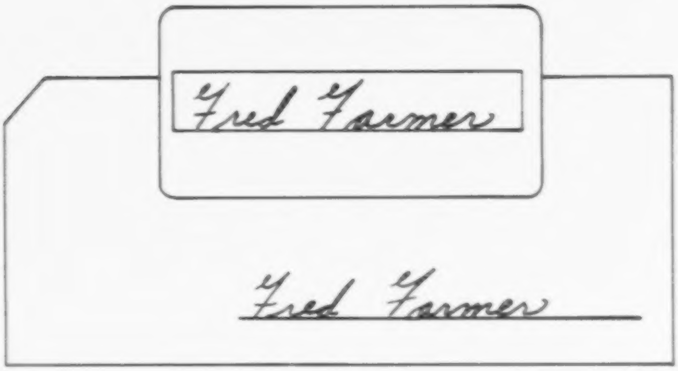
FIGURE 4



L. Remove card and form from machine

M. Obtain cardholder's signature on sales slip, checking it against signature on card (Figure 5)

FIGURE 5



N. Return card and customer's copy of completed sales slip

O. Retain bank's copy of sales slip for deposit

P. Keep other copy or copies for your own record

SALES PROCEDURES
UNIT III

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

______a. Value or size of a piece of money

______b. A person who is an expert in cheating the cashier by confusion and distraction

______c. Discount for buying merchandise before season

______d. Discount given for buying large volumes of merchandise

______e. Money made by an individual but not approved by the U.S. government

______f. Check given by a customer to pay for merchandise

______g. A card allowing a customer to charge or delay payment on purchases made

______h. List of merchandise sold, stating customer's name and address, items, quantity, price, tax, and terms of sale; used as a permanent record for customer and business

______i. Discount given for buying in large amounts

______j. A certain percent of the total bill

______k. Discount given for paying cash for merchandise

______l. Numbers on denominations of paper money which identify them

______m. To handle by an artful or unfair method to deceive

______n. Amount indicated in last column of a sales ticket; it may be the unit price of a single item or the combined cost figured by multiplying quantity times unit price

1. Personal check
2. Bulk discount
3. Shortchange artist
4. Manipulate
5. Credit card
6. Sales tax
7. Early season discount
8. Denomination
9. Extension
10. Serial numbers
11. Quantity discount
12. Cash discount
13. Counterfeit bill
14. Sales ticket

TEST

2. Complete the following list of reasons for writing a sales ticket.

   a. Provides a ______________________ of each sale

   b. Provides business with necessary information for

      1) ______________________________

      2) Sales tax reports

      3) Customer accounts

   c. Aids in making ______________________ and exchanges

   d. ______________________ sales ticket by customer serves as a legal agreement to pay debt

   e. Provides record of ______________________ expenses for a year

3. Select true statements concerning preparing and handling a sales ticket by placing an "X" in the appropriate blanks.

   _____a. Mark the correct date

   _____b. Give a sketchy description of each article sold

   _____c. Calculate the sales tax on all taxable items, under each item

   _____d. Get the signature of the person receiving the merchandise if the settlement is cash

   _____e. Check the block on the ticket to indicate the method of payment: cash, check, charge, returned, or account

   _____f. When a customer pays on account, make out a sales ticket and mark what the customer is paying for

   _____g. Give customer original copy of sales ticket at time of purchase

   _____h. In all cases, if an employee should ruin a ticket for any reason, the word VOID should be written across the front of the ticket and the original placed with the other tickets

4. List the three steps in using a tax table.

   a. ______________________________

   b. ______________________________

   c. ______________________________

TEST

5. Select true statements concerning procedures for counting change by placing an "X" in the appropriate blanks.

A. Without an automatic change dispenser

_____1. Place the money received in the cash register while making change

_____2. Make change with the least number of coins and bills

_____3. Repeat the amount of the sale and the amount of money received by the customer

_____4. Count the money to yourself as it is taken from the cash drawer to avoid counting it back to the customer

_____5. Subtract any additional change given by the customer and begin counting back from that amount

_____6. Count the change directly into the customer's hand whenever possible

B. With an automatic change dispenser

_____1. Record both the amount of the sale and the amount received on the cash register or change-making machine

_____2. It is not necessary to state the amount of change when the amount is indicated on the machine

_____3. Count the change to the customer starting with the smallest coins and ending with the largest bills

6. Select characteristics of a good check by placing an "X" in the appropriate blanks.

_____a. Check should be written in pencil

_____b. Check should be properly dated and signed

_____c. Address and phone number of customer should appear on check

_____d. Amount of check should be clearly written in numbers and letters

7. Select true statements concerning general rules for cashing checks by placing an "X" in the appropriate blanks.

_____a. Check the date

_____b. Check the amount in figures with the written amount

TEST

______c. Initial any corrections made on the check

______d. Do not accept a check marked *"For deposit only"*

______e. Do not accept a check without the account number on it or with an altered account number

______f. If the check is for the full amount of the order and is approved, treat it as a charge sale

______g. Endorse the check immediately either by stamp or by placing it on the cash register printing table

8. Complete the following list of statements concerning credit card authorization.

   a. Call for sales authorization

      1) If the amount of sale is greater than the ______________________
      2) When a charge card appears on a hot sheet
      3) On all telephone orders over ______________________
      4) If the individual other than person whose signature appears on card is using the card

   b. Tell the operator the cardholder account number, the last six digits of ______________________, and amount of the sale

   c. Write the ______________________ on the draft if approval is granted

9. Match the common denominations on the right with their pictures.

______a. Lincoln

______b. Franklin

______c. Washington

______d. Grant

______e. Jackson

______f. Jefferson

______g. Hamilton

1. $1
2. $2
3. $5
4. $10
5. $20
6. $50
7. $100

TEST

10. List four ways to detect counterfeit bills.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

11. Complete the following list of statements concerning how to report counterfeit money.

a. Inform the ______________ first

b. Write your name and __________ on the back of the bill for later identification

c. Write down any details you can remember about how you got it, who gave it to you, where you got it, and ______________________

d. Contact the ______________, U.S. Secret Service, commercial bank, or Federal Reserve bank

e. ______________________________ the money to the customer if the bills are discovered to be counterfeit

f. __________the person passing the counterfeit money

g. Avoid arguments because the passer may also be an ______________

h. Write down the passer's ______________ and license number if he/she leaves

12. Select true statements concerning common practices of a shortchange artist by placing an "X" in the appropriate blanks.

_____a. Cheats salesclerk by using flattery and bribes

_____b. Interrupts the salesclerk while making change and asks for change in a different denomination

_____c. Rushes the salesclerk to complete sales transaction

13. Circle the words which best complete the following statements concerning ways to avoid the shortchange artist.

a. Ask customer to wait and then **(take a break, finish transaction)** to avoid being confused and distracted

b. Have the customer's **(sales ticket, money)** in your hand before giving any change even if the customer asks for change several times

TEST

c. **(Always, Never)** call outloud the denomination of the bill the customer hands you

d. Record denomination of bill the customer hands you on **(sales receipt, sales ticket)**

e. Close the cash drawer and contact the **(police, manager)** if total confusion occurs

14. Explain methods of money manipulation.

a. Split bill method — ____

____

____

b. Marked bill method — ____

____

____

15. Complete the following list of ways to prevent money manipulation.

a. Examine ____________________ of a bill

b. Look for unusual ____________________

c. ____________________ or humorously let the person know you found a marking on the bill

d. Do not place money in the cash drawer until the customer has indicated ____________________ was received

e. Place any marked bill under the ______________________________

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

16. Complete a worksheet on writing sales tickets.

17. Prepare sales tickets with discounts.

18. Complete a worksheet on accepting checks.

19. Demonstrate the ability to:

a. Accept cash for merchandise.

b. Process a credit card sale.

SALES PROCEDURES
UNIT III

ANSWERS TO TEST

1.

a.	8	f.	1	k.	12
b.	3	g.	5	l.	10
c.	7	h.	14	m.	4
d.	11	i.	2	n.	9
e.	13	j.	6		

2. a. Permanent record
   b. 1) Inventory records
   c. Refunds
   d. Signed
   e. Customer's

3. a, e, f, h

4. a. Total the customer's bill
   b. Find this amount on the tax table
   c. Add amount on tax table to subtotal for total amount due

5. a. 2, 3, 5, 6

   b. 1

6. b, c, d

7. a, b, d, e, g

8. a. 1) Store limit
      3) $50.00
   b. Merchant identification number
   c. Authorization number

9.

a.	3	e.	5
b.	7	f.	2
c.	1	g.	4
d.	6		

10. Any four of the following:

    a. Hairlines on portraits may blend into the background
    b. Points around the colored seal may not be clear and sharp
    c. Crisscross lines on the border are often not clear and distinct
    d. Serial numbers may be out of line, poorly spaced, or printed too light or dark
    e. The color of a bill may be too light or dark
    f. Bills will often appear to be too clean, stiff, or thick
    g. Compare any unusual bill to another bill of the same denomination

ANSWERS TO TEST

11. a. Supervisor
    b. Date
    c. When you got it
    d. Police
    e. Do not return
    f. Stall
    g. Innocent victim
    h. Description

12. b, c

13. a. Finish the transaction
    b. Money
    c. Always
    d. Sales ticket
    e. Manager

14. a. Separating two different bill denominations by a special process, then interchanging the sides of the two bills to create two large denomination bills
    b. Placing the same identifying marks, such as torn corners or ink spots, on a small and large denomination bill, then changing bills for merchandise by using large bill first, and following later with another purchase using the smaller bill and arguing with the cashier that larger bill was given; individual is able to identify larger bill by mark and salesclerk is manipulated into giving incorrect change

15. a. Both sides
    b. Markings
    c. Casually
    d. Correct amount of change
    e. Cash drawer tray

16.-19. Evaluated to the satisfaction of the instructor

OPERATING PROCEDURES
UNIT IV

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete a perpetual inventory form, apply formulas used in pricing merchandise, and complete a profit and loss statement. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to operating procedures with their correct definitions.
2. Complete a list of ways to maintain inventory control.
3. Solve problems concerning recording inventory at cost.
4. Arrange in order the steps in taking a physical inventory.
5. Define types of perpetual inventory systems.
6. Compute average inventory.
7. Solve problems using stock turnover formulas.
8. Compute stock-sales ratio.
9. List three factors affecting prices.
10. Apply formulas used in pricing merchandise.
11. Distinguish between categories of operating expenses for a business.
12. Complete a profit and loss statement.
13. List ways losses occur.

OBJECTIVE SHEET

14. Select true statements concerning ways to prevent shoplifting.
15. Select procedures to follow if a robbery occurs.
16. Keep a daily running inventory.
17. Figure perpetual inventory prices.
18. Complete a perpetual inventory form.

OPERATING PROCEDURES
UNIT IV

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Invite a guest speaker to class to discuss inventory control and pricing.

VII. Have students discuss stock-sales ratios with their employers and report their findings to class.

VIII. Have students role play taking inventory.

IX. Have class solve pricing problems using an actual invoice, freight slip, and an assigned margin of markup.

X. Invite a banker to class to discuss cost recovery methods, including straight-line depreciation and accelerated cost recovery. Explain to class how depreciation is considered a business expense.

XI. Invite an individual from a local business to discuss overhead.

XII. Show examples of profit and loss statements to class.

XIII. Contact resource people such as a shoplifting specialist, lawyer, or store security officer and ask them to give a presentation on shoplifting prevention.

XIV. Have students prepare anti-shoplifting posters and distribute to area businesses as part of a community anti-shoplifting campaign.

XV. Discuss shoplifting laws in your state.

XVI. Have students visit retail operations in your area to obtain information on the economic impact of shoplifting (how it affects prices, hiring, salaries, etc.) and then give a brief report to class about their findings.

XVII. Invite an officer from your local police department to speak to class on how to prevent robberies and what to do in the event of a robbery.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1 — Cost Codes

      2. TM 2 — Operating Expenses

      3. TM 3 — Perpetual Inventory Card

   D. Assignment sheets

      1. Assignment Sheet #1 — Keep a Daily Running Inventory

      2. Assignment Sheet #2 — Figure Perpetual Inventory Prices

      3. Assignment Sheet #3 — Complete a Perpetual Inventory Form

      4. Assignment Sheet #4 — Compute Stock-Sales Ratio

      5. Assignment Sheet #5 — Apply Formulas Used in Pricing Merchandise

      6. Assignment Sheet #6 — Complete Profit and Loss Statements

   E. Answers to assignment sheets

   F. Test

   G. Answers to test

II. References:

A. Carlile, Robert. *Agriculture Sales and Services.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

B. Nelson, Frank W. *Distributive Education II.* Stillwater, OK: Oklahoma Curriculum and Instructional Materials Center, 1976.

C. Plank, Harry. *Agricultural Business Procedures and Records.* Columbus, OH: Ohio Agricultural Education Curriculum Materials Service, 1976.

OPERATING PROCEDURES
UNIT IV

INFORMATION SHEET

I. **Terms and definitions**

A. Basic stock list — List of merchandise that is to be kept in stock at all times

B. Break-even point — Volume of sales where the revenue received covers costs and all future sales represent profit

Example:	$8000	Cost of goods sold
	700	Fixed costs
	900	Variable costs
	$9600	Break-even point for volume of sales

(NOTE: Break-even point for an item would be the price at which costs are covered and any increase in price represents profit.)

Example:	$20.00	Cost per item
	1.60	Fixed cost
	4.75	Variable costs
	$26.35	Break-even point for item

C. Cost code — Way cost of merchandise is placed on the sales ticket for inventory and other planning and control functions (Transparency 1)

(NOTE: The cost is placed in code so customers who generally do not understand all about business expenses will not get the wrong impression.)

D. Cost of goods sold — Amount paid for merchandise, including all shipping costs

E. Depreciation — A decline in value of an asset due to such causes as wear, tear, and obsolescence which is recognized as a business expense and part may be considered an exemption from income tax

F. Fixed costs (flat expenses) — Expenses that are about the same for every article regardless of its cost or selling price

Examples: Salaries, rent, insurance

G. Gross — Overall total before deductions are subtracted

H. Gross margin (maintained margin) — Difference between net sales and cost of goods sold

I. Gross sales — Total amount of goods or services sold

INFORMATION SHEET

J. Inventory — An itemized list of goods with their estimated worth

K. List price — Basic price of an item as published in a catalog or price list; may be subject to trade or quantity discounts

L. Margin — Difference between net sales and cost of merchandise sold

M. Markdown — Reduction of selling price to a lower price

N. Markup (mark-on, initial markup) — Amount added to the cost of goods to arrive at the original selling price

O. Net — What is left after all expenses and losses are deducted

P. Net profit — Amount of money left after payment of all costs and expenses other than income taxes

Q. Net sales — Gross sales less any returns or adjustments

R. Perpetual inventory card — Record kept of each item showing the amount of merchandise put in stock, withdrawn, and on hand at any particular time without the necessity of taking a physical count (Transparency 3)

S. Physical inventory — Actual count of the goods in stock, usually taken two to four times a year

T. Stock count — Counting items before advertising or re-ordering

(NOTE: The stock count is often done during slack periods to avoid inconveniencing or ignoring customers.)

U. Stock-sales ratio — Relationship of retail stock to the sales for that month

(NOTE: This allows a department to figure how much stock it will need in order to meet planned sales for the month and still leave merchandise at the end of the month for the next month's B.O.M. [beginning of month] stock.)

Example: A stock-sales ratio of 3:1 means there is three times as much stock at the beginning of the month as sales for the month

INFORMATION SHEET

V. Suggested retail price — Retail price paid by consumer which has been suggested by the manufacturer

W. Turnover — Number of times during a given period that the average amount of stock on hand is sold and replaced

(NOTE: The time period for figuring turnover is usually for one year. Turnover can be expressed in either units or dollars. It is helpful to compare turnover rates with the rates of other years and similar departments. Profit can be increased by increasing turnover without an equal or larger increase in operating expenses.)

X. Unit pricing — Price per item

Y. Variable costs — Expenses that are different for each item but are approximately the same percentage of the selling price

Examples: Supplies, delivery, communication

Z. Wholesale price — Price paid for goods purchased in quantity by retailer from wholesaler for resale

II. Ways to maintain inventory control

A. Office clerk must maintain inventory records

B. Manager should reorder items promptly

C. Employee should report when item is low

D. Check daily computer print out

III. Recording inventory at cost

A. Using retail prices

1. Record the retail prices of merchandise
2. Multiply the retail price of each item in stock by the number of articles on hand at the time of the inventory
3. Add the total retail value for each item to arrive at the total inventory at retail
4. Multiply the total inventory retail value by the markup percentage to arrive at the total markup

INFORMATION SHEET

5. Subtract the total markup from the total inventory at retail value to arrive at the total inventory at cost

Example:
20 items selling for $2.00 each = $ 40.00
50 items selling for $5.00 each = $250.00
40 items selling for $1.00 each = $ 40.00
Total inventory at retail = $330.00

$330
× .25 (25% markup)
1650
660
$82.50 Total markup

$330.00 Total inventory at retail
− 82.50 Total markup
$247.50 Total inventory at cost

B. Using cost codes (Transparency 1)

1. Record the costs of merchandise taken from the cost codes on the price tags

2. Multiply the cost of each item in stock by the number of articles on hand at the time of the inventory

3. Add the total costs for each item to arrive at the total inventory at cost

Example:
20 items costing $ 2.00 each = $ 40.00
20 items costing $ 5.00 each = $100.00
30 items costing $10.00 each = $300.00
Total inventory at cost $440.00

IV. **Steps in taking a physical inventory**

(NOTE: Some businesses have implemented a computerized inventory system which keeps a current inventory record.)

A. Form a team consisting of a checker and a caller

B. Divide the store according to its layout or established departments

C. Group merchandise according to price, type, and style

D. Have caller give out information to the checker

Examples: Article, time purchased, quantity, retail or cost price

E. Have checker record information on an inventory form

F. Have caller look occasionally to see if checker is recording information accurately

INFORMATION SHEET

V. **Types of perpetual inventory systems**

(NOTE: These systems have an influence on stocking procedure. The items to be sold first would be moved to the front of shelves and the top of stacks.)

A. FIFO (First In First Out) — First items placed in stock are the first ones taken out

(NOTE: This is the most common method.)

B. LIFO (Last In First Out) — Newest items placed in stock are the first ones taken out

VI. **Average inventory**

A. Add the opening inventories for each month of the year to the closing inventory of the period

(NOTE: This may be done using retail value or actual number of units.)

Example:

January 1	$ 2,198
February 1	2,300
March 1	2,497
April 1	2,500
May 1	2,500
June 1	2,000
July 1	2,250
August 1	2,099
September 1	2,100
October 1	2,700
November 1	2,600
December 1	2,598
December 31	2,000
	$30,342

B. Divide the total monthly figures by 13 for the average inventory

Example: $\frac{\$30,342}{13} = \$2,334$

INFORMATION SHEET

VII. **Stock turnover formulas**

A. In terms of physical units

$$\frac{\text{Number of units sold}}{\text{Average inventory in units}} = \text{Rate of stock turnover}$$

Example: If 2,000 books were sold during the year and number of books in stock was 1,000, the rate of stock turnover is 2

$$\frac{2{,}000}{1{,}000} = 2$$

B. On a dollar basis

Example: If $10,000 worth of books were purchased during the year and an average of $5,000 worth of books were kept in inventory, the store has an average stock turnover of 2

$$\frac{\$10{,}000}{\$\ 5{,}000} = 2$$

VIII. **Stock-sales ratio**

(NOTE: B.O.M. means beginning of month and E.O.M. means end of month. The amount of stock may be found in inventory records. The sales figures may be found in sales records.)

A. B.O.M. stock-sales ratio $= \dfrac{\text{B.O.M. stock at retail}}{\text{Sales for the month}}$

Example: If the amount of stock at the beginning of the month is $20,000 and sales for the month are $5,000, the stock-sales ratio is 4:1 (four to one)

$$\frac{\$20{,}000}{\$\ 5{,}000} = \frac{4}{1} = 4{:}1$$

B. E.O.M. stock-sales ratio $= \dfrac{\text{E.O.M. stock at retail}}{\text{Sales for the month}}$

Example: If the stock at the end of the month equals $10,000 and the sales for the month are $5,000, the stock-sales ratio is 2:1 (two to one)

$$\frac{\$10{,}000}{\$\ 5{,}000} = \frac{2}{1} = 2{:}1$$

INFORMATION SHEET

IX. Factors affecting prices

A. Cost of merchandise

B. Overhead expenses

C. Desired margin

X. Formulas used in pricing merchandise

Given	To Find	Procedure
Cost price, retail price	Markup in dollars	Subtract cost from retail
Markup in dollars, retail price	Cost price	Subtract markup from retail
Markup in dollars, cost price	Retail price	Add cost and markup
Retail price, markup in dollars	Markup percentage (retail)	Divide markup by retail
Cost price, markup in dollars	Markup percentage (cost)	Divide markup by cost
Cost price, original retail selling price	Initial markup	Subtract cost price from original retail selling price
Cost price, final sales price	Maintained markup	Subtract cost price from final sales price
Retail price, markup percentage	Cost price	Multiply retail price by (100% - M%)
Cost price, markup percentage	Retail price	Divide cost by (100% - M%)
Estimated expenses, profits, price reductions, sales	Initial markup	Add expenses, profits, and price reductions; divide this figure by (Sales + Reductions)
Original retail selling price, final sales price	Markdown	Subtract final sales price from original retail price
Dollar markdown, total sales	Markdown percentage	Divide dollar markdown by total sales

INFORMATION SHEET

XI. **Categories of operating expenses for a business** (Transparency 2)

A. Fixed costs

1. Salaries and wages of all management, sales, and office employees
2. Rent
3. Depreciation
4. Property taxes
5. Insurance
6. Bad debt losses
7. Membership dues

   Examples: Trade associations, Chamber of Commerce, professional and civic organizations

8. Building maintenance

B. Variable costs

1. All types of advertising expenses
2. Store supplies
3. Receiving costs
4. Delivery costs
5. Communication costs
6. Repairs on equipment
7. Donations
8. Miscellaneous

   Examples: Legal fees, training expenses of new employees

XII. **Profit and loss statement (operating statement)**

A. Cost of goods sold must be subtracted from the net sales to arrive at the gross margin

INFORMATION SHEET

B. Operating expenses must be subtracted from the gross margin to arrive at the net profit before income taxes

Example:

OPERATING STATEMENT

OPERATING STATEMENT, JANUARY 1 - DECEMBER 31, 1984

Net Sales	$300,000
Cost of Goods Sold	200,000
Gross Margin	$100,000
Operating Expenses	85,000
Net Profit Before Income Taxes	$15,000

XIII. Ways losses occur

A. Improper receiving of merchandise

B. Pilferage

C. Failure to bill merchandise

D. Error in billing

E. Breakage, spoilage, shrinkage

F. Incorrect physical inventory count

G. Discount and markdown

H. Obsolescence

I. Inaccurate weights and measures

J. Transfers not recorded

K. Shoplifting

INFORMATION SHEET

XIV. **Ways to prevent shoplifting**

(NOTE: The employee is actually the heart of prevention.)

A. Employee's responsibilities

1. Practice good sales techniques
    a. Greet customers promptly and professionally
    b. Do not leave floor unattended
    c. Destroy sales slips left on the counter and floor
2. Know the merchandise
    a. Know the prices; do not allow switching
    b. Check merchandise for hidden items at time of sale by opening boxes and running hands over folded items
3. Be observant
    a. Keep eyes on sales area and customers
    b. Notice what people bring into the store
    c. Make presence known at all times

B. Management's safeguards

1. Train employees
2. Plan store layout carefully
    a. Avoid cluttered and high shelves and displays
    b. Keep departments well-lighted
    c. Do not place displays near doors
    d. Rotate merchandise location
3. Use wide angle mirrors
4. Prosecute shoplifters

INFORMATION SHEET

5. Reward employees for being alert to potential thieves

6. Post store policies and warnings about shoplifting

XV. **Procedures to follow if a robbery occurs**

A. Do what the robber says without arguing

(NOTE: Do not try to be a hero.)

B. Concentrate on the robber's description

Example: Age; nationality; height; weight; build; complexion; eye and hair color; clothing; right or left handedness; voice characteristics, such as high, low, rapid, slow, lisp, accent; physical characteristics, such as tatoos, scars, limp; type of weapon

C. Do not touch anything the robber may have touched

D. Get the license number and a description of the getaway car if possible

E. Call the police

F. Write down descriptions of the suspects, weapons, and car

G. Get the names of customers and other witnesses and have them write down the robber's description(s)

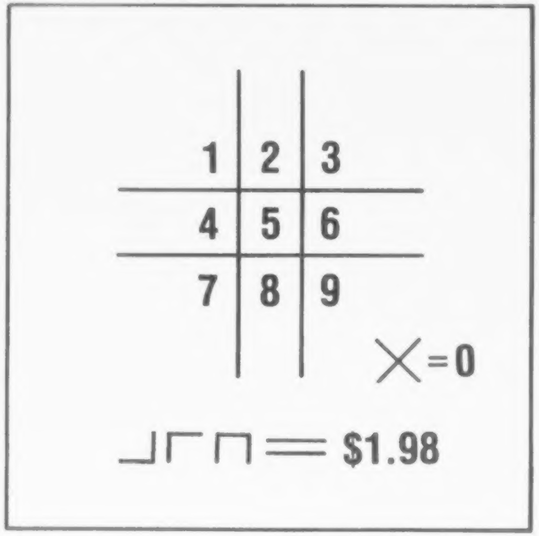
H. Do not discuss the crime with anyone until getting permission from the police

I. Notify management or owner of business

Cost Codes

123456 7890
SPRING LAMB

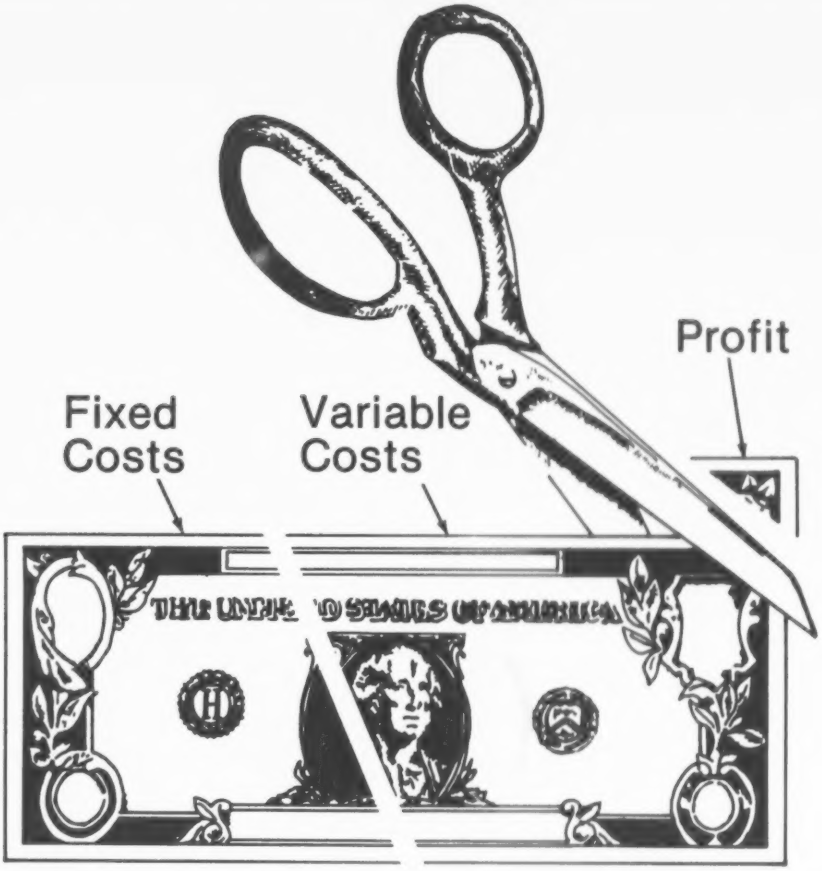
SMA ═ $1.98


1
2
3
4
5
6
7
8
9
×=0
$1.98

1234 567890
MAKE PROFIT

MIF ═ $1.98

Operating Expenses


Profit
Fixed Costs
Variable Costs
THE UNITED STATES OF AMERICA

Fixed

Salaries
Wages
Rent
Depreciation
Property Taxes
Insurance
Bad Losses
Membership Dues
Building Maintenance

Variable

Advertising
Supplies
Receiving Costs
Delivery
Communcations
Repairs on Equipment
Donations
Legal Fees
Training

Perpetual Inventory Card

PERPETUAL INVENTORY CARD

Item: Coveralls #292

Date	Pur. Reg. or Stock Reg. No.	Put in Stock	Withdrawn	Balance
4/4/--	325	600		600
4/10/--	1271		100	500
4/11/--	612		200	300
4/14/--	7700	1,000		1,300
5/10/--	033		350	950

OPERATING PROCEDURES
UNIT IV

ASSIGNMENT SHEET #1 — KEEP A DAILY RUNNING INVENTORY

Directions: Some merchants find it is to their advantage to keep a daily running inventory form or a perpetual inventory of their stock. Determine the new balance after each transaction below.

NEW BALANCE

1. Corn ....on hand .... 4,860#

sold .... 1,520# .... a. ______________

sold .... 2,340 .... b. ______________

bought ..... 5,890# .... c. ______________

sold .... 3,670# .... d. ______________

2. Beef maker ....on hand .... 5,400#

bought .....10,000# .... a. ______________

sold .... 1,500# .... b. ______________

sold .... 3,000# .... c. ______________

3. Alfalfa seed ....on hand ....14 bu.

sold .... 6 bu.............. a. ______________

bought .....10 bu.............. b. ______________

sold .... 4 bu.............. c. ______________

OPERATING PROCEDURES
UNIT IV

ASSIGNMENT SHEET #2 — FIGURE PERPETUAL INVENTORY PRICES

Directions: Complete the price list and find the total inventory amount.

Inventory for month ending ______________________________ 19__________
(Date assignment completed)

Actual Count Different Locations			Description of Items	Unit	No. of Units	Unit Price	Amount
(112,250 lb.)			No. 2 corn	cwt.	1,122½	5.00	a. ____
(6,850 lb.)			Oats	cwt.	68½	2.35	b. ____
			FEED				
25	20	5	100# bran sack	ton	2½	61.00	c. ____
30			100# mineral sack	cwt.	30	6.20	d. ____
40	30	10	50# salt blocks	ea.	80	3.95	e. ____
200	60		32% beefmaker 100# sk.	cwt.	260	10.20	f. ____
100	25		4% porkmaker 100# sk.	cwt	125	10.35	g. ____
			FERTILIZER				
5,000	250		80# sacks 6-24-12	ton	210	175.50	h. ____
2,000	500	50	80# sacks 5-20-20	ton	102	175.50	i. ____
2,000	600		50# sacks 33-0-0	ton	65½	180.00	j. ____
			SUPPLIES				
		120 lb.	Bluegrass seed	lb.	120	.40	k. ____
		210 lb.	White clover seed	lb.	210	1.90	l. ____
		300 lb.	Ryegrass seed	lb.	300	.72	m. ____
		40	10W 30 motor oil (5 gal. c)	can	40	18.50	n. ____

ASSIGNMENT SHEET #2

Actual Count Different Locations	Description of Items	Unit	No. of Units	Unit Price	Amount
45	Cans hydraulic oil (2 gal. c)	can	45	4.80	o. ____
10	Cans gear oil (2 gal. c)	can	10	3.80	p. ____
12 car.	Tubes lube (10 ea)	tube	120	1.60	q. ____
20 bx.	Terramycin (4)	box	20	3.10	r. ____
8 bx.	Terramycin (20)	box	8	8.20	s. ____
30 bx.	(5) 25 amp plug fuse	box	30	1.20	t. ____
22 bx.	(5) 20 amp lug fuse	box	22	1.20	u. ____
15 gal.	Stock dip	gal.	15	6.20	v. ____
22 gal.	Fly spray	gal.	22	3.00	w. ____
8 gal.	Chlordane	gal.	8	8.50	x. ____
20	Vegetable dust (2# box)	box	20	2.10	y. ____
20	Rose-orn dust (2# box)	box	20	2.30	z. ____
22 bale	Baler twine	bale	22	29.50	aa. ____
		Total inventory amount			bb. ____

OPERATING PROCEDURES
UNIT IV

ASSIGNMENT SHEET #3 — COMPLETE A PERPETUAL INVENTORY FORM

Directions: Enter the following items of sales and purchases on the perpetual inventory form. Keep a running balance. Materials received are marked "in."

DATE	TRANSACTION
1	300# shelled corn 600# beefmaker 200# shelled corn 500# soybean meal 1 bale twine
2	200# porkmaker 800# shelled corn 1 ton porkmaker 800# soybean meal 2 bu. alfalfa seed
3	500# shelled corn 600# soybean meal 1000# shelled corn 400# soybean meal 2 bales twine 12,000# shelled corn (in)
4	1 ton beefmaker 500# beefmaker 1 ton soybean meal 800# soybean meal 2 bu. alfalfa seed
5	2 ton shelled corn 1 ton soybean meal 2 ton porkmaker (in) 5 ton beefmaker (in)
8	16 bales twine 800# shelled corn 300# porkmaker 600# soybean meal 500# soybean meal 3 bu. alfalfa seed
9	5 tons soybean meal (in) 600# soybean meal 500# beefmaker 10 bales twine
10	1600# beefmaker 1200# shelled corn 500# porkmaker 700# shelled corn 900# soybean meal 50 bales twine (in) 10 bu. alfalfa seed (in)
11	300# porkmaker 200# beefmaker 20 bales twine 2 tons shelled corn 1 bu. alfalfa seed 10,500# shelled corn (in)
12	4500# shelled corn 500# porkmaker 500# soybean meal 800# soybean meal
15	600# beefmaker 800# porkmaker 500# soybean meal 1200# beefmaker 100# soybean meal
16	10 bales twine 500# shelled corn 600# soybean meal
17	1 ton soybean meal 1 ton porkmaker 2 tons shelled corn 5 bales twine 3 bu. alfalfa seed 8000# shelled corn (in)
18	10 bu. alfalfa seed (in) 700# soybean meal 500# beefmaker 900# shelled corn 400# porkmaker 6 bales twine

ASSIGNMENT SHEET #3

DATE	TRANSACTION
19	3600# shelled corn
	1000# shelled corn
	1000# soybean meal
	1000# beefmaker
	3 ton beefmaker (in)
	3 ton porkmaker (in)
22	2200# shelled corn
	10 bales twine
	1500# porkmaker
	1000# soybean meal
	500# shelled corn
	6 bales twine
23	1 ton porkmaker
	1800# shelled corn
	500# porkmaker
	600# beefmaker
	1 ton soybean meal
24	1700# shelled corn
	500# soybean meal
	1000# porkmaker
	500# beefmaker
	5 tons soybean meal (in)
25	10 bales twine
	1000# shelled corn
	2500# soybean meal
	2 bu. alfalfa seed
26	2 ton beefmaker
	1000# porkmaker
	300# shelled corn
29	1800# porkmaker
	1600# shelled corn
	500# soybean meal
	2 bales twine
30	600# soybean meal
	1000# porkmaker
	500# beefmaker
	2 bu. alfalfa seed

Perpetual Inventory

BEGINNING OF THE MONTH BALANCE																		
date	Shelled Corn			Beefmaker			Porkmaker			Soybean Meal			Twine			Alfalfa Seed		
	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.
	Beginning balance		9000#			4000#			6000#			9800#			50			12
1																		
2																		
3																		
4																		
5																		
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31																		

ASSIGNMENT SHEET #3

OPERATING PROCEDURES
UNIT IV

ASSIGNMENT SHEET #4 — COMPUTE STOCK-SALES RATIO

Directions: Figure stock-sales ratio for the following situations.

(NOTE: Refer to objective VIII. in the information sheet.)

1. B.O.M. stock $50,000; sales of $20,000

2. E.O.M. stock $50,000; sales $10,000

ASSIGNMENT SHEET #4

3. B.O.M. stock $25,000; sales $5,000

4. E.O.M. stock $20,000; sales $4,000

5. B.O.M. stock $24,000; sales $6,000

OPERATING PROCEDURES
UNIT IV

ASSIGNMENT SHEET #5 — APPLY FORMULAS USED IN PRICING MERCHANDISE

(NOTE: Please work problems in space provided on assignment sheet.)

1. Figure retail price using the following information.

   a. Cost price $115.00; markup in dollars $15.00

      Retail price ____________________

   b. Cost price $2.69; markup in dollars $2.00

      Retail price ____________________

   c. Cost price $2.55; markup percentage 15%

      Retail price ____________________

ASSIGNMENT SHEET #5

d. Cost price $1.95; markup percentage 15%

Retail price ____________________

2. Figure cost price using the following information.

a. Retail price $7.25; markup in dollars $2.00

Cost price ____________________

b. Retail price $15.95; markup percentage 25%

Cost price ____________________

3. Figure markup in dollars using the following information.

a. Retail price $14.95; cost price $10.74

Markup ____________________

ASSIGNMENT SHEET #5

b. Retail price $60.00; cost price $52.00

Markup ______________________

4. Figure markup as a percentage of retail price using the following information.

a. Retail price $50; markup in dollars $20.00

Markup ______________________

b. Retail price $124.00; markup in dollars $54.00

Markup ______________________

5. Figure markup as a percentage of cost price using the following information.

a. Cost price $25.00; markup in dollars $25.00

Markup ______________________

b. Cost price $1.00; markup in dollars $1.39

Markup ______________________

ASSIGNMENT SHEET #5

6. Figure initial markup using the following information.

   a. Cost price $.69; original retail selling price $1.00

   Markup ____________________

   b. Cost price $4.00; original retail selling price $6.50

   Markup ____________________

7. Figure maintained markup using the following information.

   a. Cost price $7.95; final sales price $9.00

   Markup ____________________

   b. Cost price $3.25; final sales price $4.00

   Markup ____________________

ASSIGNMENT SHEET #5

8. Figure markdown using the following information.

   a. Original retail selling price $9.95; final sales price $6.95

   Markdown ____________________

   b. Original retail selling price $10.95; final sales price $6.95

   Markdown ____________________

9. Figure markdown percentage using the following information.

   a. Dollar markdown $2.00; total sales $84.00

   Markdown ____________________

   b. Dollar markdown $10.00; total sales $400.00

   Markdown ____________________

ASSIGNMENT SHEET #5

10. Given the regular markup and the price reduction percentage in the chart below, select the correct percentage of unit increase necessary to maintain the same total markup.

Example: If a unit has a regular markup of 40% and you want to reduce the price 10%, you will have to increase the volume by 33.3% to make that same gross profit

a. If regular markup is 60% and price reduction is 25%, then unit increase will be ______%

b. If regular markup is 50% and price reduction is 25%, then unit increase will be ______%

c. If regular markup is 40% and price reduction is 30%, then unit increase will be ______%

d. If regular markup is 45% and price reduction is 35%, then unit increase will be ______%

e. If regular markup is 35% and price reduction is 15%, then unit increase will be ______%

INCREASE IN SALES VOLUME NEEDED TO OFFSET PRICE REDUCTIONS

	Regular Markup of								
Price Reductions	25%	30%	35%	40%	45%	50%	60%	65%	75%
5%	25%	20%	16.6%	14.3%	12.5%	11.1%	9%	8.3%	7.1%
10%	66.7%	50%	40%	33.3%	28.6%	25%	20%	18.2%	15.3%
15%	150%	100%	75%	60%	50%	42.8%	33.3%	30%	25%
20%	400%	200%	133%	100%	80%	66.6%	50%	44.4%	36.3%
25%		500%	250%	166.6%	125%	100%	70.2%	62.5%	50%
30%			600%	300%	200%	150%	100%	85.7%	66.7%
35%				700%	350%	233%	140%	116.7%	87.5%
40%					800%	400%	200%	160%	114.3%
45%						900%	300%	225%	150%
50%							500%	333%	200%

OPERATING PROCEDURES
UNIT IV

ASSIGNMENT SHEET #6 — COMPLETE PROFIT AND LOSS STATEMENTS

Directions: Complete the following profit and loss statements (operating statements).

Profit and Loss Statement #1

A. SALES:

Group A	650,426 lbs. @ $4.25/lb.		$2,764,312
Group B	220,424 units @ $.31/u		68,331
Net Sales		A	

DIRECT MATERIALS TRANSFERRED:

Group A	650,426 lbs @ $2.35/lb.		$1,528,501
Group B	220,424 units @ $.17/u		37,472
Cost of Goods		B	
Direct Labor Cost			1,845,063
Administrative			1,065,043

INDIRECT EXPENSES:

Materials and supplies	1,600		
Utilities	1,450		
Maintenance	2,450		
Advertising and Promotion	15,650		
Taxes	5,200		
Insurance	2,000		
Depreciation	6,200		
Total Indirect Expenses		C	
TOTAL EXPENSES		D	
NET PROFIT FOR THE YEAR		E	

ASSIGNMENT SHEET #6

Profit and Loss Statement #2

B. SALES:

Group A	58,929 lbs. @ $3.50/lb.		$206,252
Group B	220,424 units @ $.31/u		58,215
Net Sales		A	

DIRECT MATERIALS TRANSFERRED:

Group A	58,929 lbs. @ $2.35/lb.		$138,483
Group B	232,861 units @ $.17/u		39,586
Cost of Goods		B	
Direct Labor Cost			20,213
Administrative			4,915

INDIRECT EXPENSES:

Materials and supplies	2,100		
Utilities	1,800		
Maintenance	2,800		
Advertising and Promotion	10,000		
Taxes	6,200		
Insurance	2,000		
Depreciation	7,200		
Total Indirect Expenses		C	
TOTAL EXPENSES		D	
NET PROFIT FOR THE YEAR		E	

OPERATING PROCEDURES
UNIT IV

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. a. 3340
   b. 1000
   c. 6890
   d. 3220

2. a. 15,400
   b. 13,900
   c. 10,900

3. a. 8 bushels
   b. 18 bushels
   c. 14 bushels

Assignment Sheet #2

1. a. $5,612.50
   b. $160.98
   c. $152.50
   d. $186.00
   e. $316.00
   f. $2,652.00
   g. $1,293.75
   h. $36,855.00
   i. $17,901.00
   j. $11,790.00
   k. $48.00
   l. $399.00
   m. $216.00
   n. $740.00
   o. $216.00
   p. $38.00
   q. $192.00
   r. $62.00
   s. $65.60
   t. $36.00
   u. $26.40
   v. $93.00
   w. $66.00
   x. $68.00
   y. $42.00
   z. $46.00
   aa. $649.00
   bb. $79,922.73

Assignment Sheet #3

-Perpetual Inventory

BEGINNING OF THE MONTH BALANCE

date	shelled corn			beefmaker			porkmaker			soybean meal			twine			alfalfa seed		
	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.	In	Out	Bal.
			9,000			4,000			6,000			9,800			50			12 bu
1		500	8,500		600	3,400					500	9,300		1	49			
2		800	7,700					2,200	3,800		800	8,500					2	10
3	12,000	1,500	18,200								1,000	7,500		2	47			
4					2,500	900					2,800	4,700					2	8
5		4,000	14,200	10,000		10,900	4,000		7,800		2,000	2,700						
6																		
7																		
8		800	13,400					300	7,500		1,100	1,600		16	31		3	5
9					500	10,400				10,000	600	11,000		10	21			
10		1,900	11,500		1,600	8,800		500	7,000		900	10,100	50		71	10		15
11	10,500	4,000	18,000		200	8,600		300	6,700					20	51		1	14
12		4,500	13,500					500	6,200		1,300	8,800						
13																		
14																		
15					1,800	6,800		800	5,400		600	8,200						
16		500	13,000								600	7,600		10	41			
17	8,000	4,000	17,000					2,000	3,400		2,000	5,600		5	36		3	11
18		900	16,100		500	6,300		400	3,000		700	4,900		6	30	10		21
19		4,600	11,500	6,000	1,000	11,300	6,000		9,000		1,000	3,900						
20																		
21																		
22		2,200	8,800					1,500	7,500		1,000	2,900		16	14			
23		1,800	7,000		600	10,700		2,500	5,000		2,000	900						
24		1,700	5,300		500	10,200		1,000	4,000	10,000	500	10,400						
25		1,000	4,300								2,500	7,900		10	4		2	19
26		300	4,000		4,000	6,200		1,000	3,000									
27																		
28																		
29		1,600	2,400					1,800	1,200		500	7,400		2	2			
30					500	5,200		1,000	200		600	6,800					2	17

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #4

1. $\frac{\$50{,}000}{20{,}000} = \frac{5}{2} = \frac{2.5}{1} = 2.5{:}1$
2. $\frac{\$50{,}000}{10{,}000} = \frac{5}{1} = 5{:}1$
3. $\frac{\$25{,}000}{\$\ 5{,}000} = \frac{5}{1} = 5{:}1$
4. $\frac{\$20{,}000}{\$\ 4{,}000} = \frac{5}{1} = 5{:}1$
5. $\frac{\$24{,}000}{\$\ 6{,}000} = \frac{4}{1} = 4{:}1$

Assignment Sheet #5

1. a. $130.00
   b. $4.69
   c. $3.00
   d. $2.29
2. a. $5.25
   b. $11.96
3. a. $4.21
   b. $8.00
4. a. 40%
   b. 44%
5. a. 100%
   b. 139%
6. a. $.31
   b. $2.50
7. a. $1.05
   b. $.75
8. a. $3.00
   b. $4.00
9. a. 2.4%
   b. 2.5%
10. a. 70.2%
    b. 100%
    c. 300%
    d. 350%
    e. 75%

Assignment Sheet #6

	Statement #1		Statement #2
a.	2,832,643	a.	264,467
b.	1,565,973	b.	178,069
c.	34,550	c.	32,100
d.	4,510,629	d.	235,297
e.	1,677,986	e.	29,170

OPERATING PROCEDURES
UNIT IV

NAME ________________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. Overall total before deductions are subtracted

_____b. Way cost of merchandise is placed on the sales ticket for inventory and other planning and control functions

_____c. Relationship of retail stock to the sales for that month

_____d. Amount of money left after payment of all costs and expenses other than income taxes

_____e. Basic price of an item as published in a catalog or price list; may be subject to trade or quantity discounts

_____f. Price per item

_____g. What is left after all expenses and losses are deducted

_____h. Number of times during a given period that the average amount of stock on hand is sold and replaced

_____i. A decline in value of an asset due to such causes as wear, tear, and obsolescence which is recognized as a business expense and part may be considered an exemption from income tax

_____j. Difference between net sales and cost of goods sold

_____k. Expenses that are about the same for every article regardless of its cost or selling price

1. Turnover
2. Stock-sales ratio
3. Fixed costs
4. Inventory
5. Markdown
6. Net
7. Gross
8. Stock count
9. Net sales
10. Physical inventory
11. Unit pricing

TEST

______l. Volume of sales where the revenue received covers costs and all future sales represent profit

______m. Gross sales less any returns or adjustments

______n. List of merchandise that is to be kept in stock at all times

______o. Record kept of each item showing the amount of merchandise put in stock, withdrawn, and on hand at any particular time without the necessity of taking a physical count

______p. Reduction of selling price to a lower price

______q. Amount paid for merchandise, including all shipping costs

______r. Actual count of the goods in stock, usually taken two to four times a year

______s. Expenses that are different for each item but are approximately the same percentage of the selling price

______t. Amount added to the cost of goods to arrive at the original selling price

______u. Counting items before advertising or reordering

______v. An itemized list of goods with their estimated worth

______w. Difference between net sales and cost of merchandise sold

______x. Total amount of goods or services sold

______y. Retail price by consumer which has been suggested by the manufacturer

______z. Price paid for goods purchased in quantity by retailer from wholesaler for resale

12. Gross sales
13. Net profit
14. Suggested retail price
15. Markup
16. List price
17. Cost code
18. Gross margin
19. Break-even point
20. Basic stock list
21. Depreciation
22. Cost of goods sold
23. Variable costs
24. Perpetual inventory card
25. Margin
26. Wholesale price

TEST

2. Complete the following list of ways to maintain inventory control.

a. ______________________ must maintain inventory records

b. ______________________ should reorder items promptly

c. ______________________ should report when item is low

d. Check ______________________ computer print out

3. Solve the following problems concerning recording inventory at cost.

a. Given the following number of items and their retail prices, compute the total inventory. Markup is 25% of retail.

732 items @ $2.95
122 items @ $6.50
682 items @ $2.50
519 items @ $7.50
300 items @ $1.50

b. Given the following number of items and their costs, compute the total inventory.

230 items @ $2.50
120 items @ $5.00
262 items @ $2.50
154 items @ $5.75
300 items @ $1.00

4. Arrange in order the steps in taking a physical inventory by numbering from one to six.

______a. Have caller look occasionally to see if checker is recording information accurately

______b. Divide the store according to its layout or established departments

______c. Have checker record information on an inventory form

______d. Have caller give out information to the checker

TEST

_____e. Form a team consisting of a checker and a caller

_____f. Group merchandise according to price, type, and style

5. Define types of perpetual inventory systems.

   a. FIFO — ____

   ____

   ____

   b. LIFO — ____

   ____

   ____

6. Compute average inventory in the following situation.

   A store had the following beginning inventories: January $20,000; February $19,000; March $19,000; April $18,500; May $18,000; June $19,500; July $22,000; August $26,000; September $26,000; October $22,000; November $20,000; December $19,500. The ending inventory on December 31 was $19,288.

7. Solve the following problems using stock turnover formulas.

   a. In terms of physical units — If 3,000 sacks of 40 lb. dog food were sold during the year and number of sacks in stock was 1,000, the rate of stock turnover is

   ____

   b. On a dollar basis — If $8,000 worth of fertilizer was purchased during the year and an average of $4,000 worth of fertilizer was kept in inventory, the store has an average turnover of ____________________

TEST

8. Compute stock-sales ratio for the following situations.

   a. Amount of stock at retail at the beginning of the month was $50,000 and the sales were $10,000

   b. Amount of stock at retail at the end of the month was $40,000 and the sales were $8,000

9. List three factors affecting prices.

   a. ______________________________

   b. ______________________________

   c. ______________________________

10. Apply the formulas used in pricing merchandise to the problems listed on the following pages.

Given	To Find	Procedure
Cost price, retail price	Markup in dollars	Subtract cost from retail
Markup in dollars, retail price	Cost price	Subtract markup from retail
Markup in dollars, cost price	Retail price	Add cost and markup
Retail price, markup in dollars	Markup percentage (retail)	Divide markup by retail
Cost price, markup in dollars	Markup percentage (cost)	Divide markup by cost
Cost price, original retail selling price	Initial markup	Subtract cost price from original retail selling price
Cost price, final sales price	Maintained markup	Subtract cost price from final sales price

TEST

Given	To Find	Procedure
Retail price, markup percentage	Cost price	Multiply retail price by (100% - M%)
Cost price, markup percentage	Retail price	Divide cost by (100% - M%)
Estimated expenses, profits, price reductions, sales	Initial markup	Add expenses, profits, and price reductions; divide this figure by (Sales + Reductions)
Original retail selling price, final sales price	Markdown	Subtract final sales price from original retail price
Dollar markdown, total sales	Markdown percentage	Divide dollar markdown by total sales

a. Find the markdown if the original retail selling price is \$10.95 and the final sales price is \$6.95.

b. Figure the retail price of the cost price is \$2.55 and the markup percentage is 15%.

c. Find the retail price if the cost price is \$115 and the markup is \$15.

d. Find the initial markup if the cost price is \$4.00 and the original retail selling price is \$6.50.

TEST

e. Find the markup in dollars if the cost price is $52.00 and the retail price is $60.00.

f. Find the maintained markup if the cost price is $3.25 and the final sales price is $4.00.

g. Figure the markup percentage of cost if the cost price is $25.00 and the markup is $25.00.

h. Find the markup percentage of retail if the retail price is $50 and the markup in dollars is $20.

i. Find the cost price if the markup in dollars is $2.00 and the retail price is $7.25.

j. Find the cost price if the markup percentage is 25% and the retail price is $15.95.

TEST

11. Distinguish between categories of operating expenses for a business by placing an "F" for fixed costs in the appropriate blanks.

_____a. Rent

_____b. Delivery costs

_____c. Insurance

_____d. Depreciation

_____e. Salaries and wages

_____f. Donations

_____g. Store supplies

_____h. Communication costs

_____i. Bad debt losses

_____j. Building maintenance

12. Complete a profit and loss statement using the following information: net sales $600,000; cost of goods sold $300,000; and operating expenses $95,000.

TEST

13. List six ways losses occur.

a. ____________________

b. ____________________

c. ____________________

d. ____________________

e. ____________________

f. ____________________

14. Select true statements concerning ways to prevent shoplifting by placing an "X" in the appropriate blanks.

a. Employee's responsibilities

_____1. Greet customers promptly and professionally

_____2. It is alright to leave floor unattended

_____3. Do not destroy sales slips left on the counter and floor

_____4. Know the prices; do not allow switching

_____5. Notice what people bring into the store

_____6. Make presence known at all times

b. Management's safeguards

_____1. Train employees

_____2. Keep departments dimly-lighted

_____3. Place displays near doors

_____4. Use wide angle mirrors

_____5. Prosecute shoplifters

_____6. Post store policies and warnings about shoplifting

TEST

15. Select procedures to follow if a robbery occurs by placing an "X" in the appropriate blanks.

_____a. Do what the robber says without arguing

_____b. Concentrate on the robber's description

_____c. Do not touch anything the robber may have touched

_____d. Get the license number and a description of the get away car if possible

_____e. Call the news media

_____f. Write down descriptions of the suspects, weapons, and car

_____g. Discuss the crime with customers and other witnesses

_____h. Notify management or owner of business

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

16. Keep a daily running inventory.

17. Figure perpetual inventory prices.

18. Complete a perpetual inventory form.

OPERATING PROCEDURES
UNIT IV

ANSWERS TO TEST

1.

a.	7	h.	1	o.	24	v.	4
b.	17	i.	21	p.	5	w.	25
c.	2	j.	18	q.	22	x.	12
d.	13	k.	3	r.	10	y.	14
e.	16	l.	19	s.	23	z.	26
f.	11	m.	9	t.	15		
g.	6	n.	20	u.	8		

2. a. Office clerk
   b. Manager
   c. Employee
   d. Daily

3. a.

732 @ $2.95	=	$2159.40	
122 @ 6.50	=	793.00	
682 @ 2.50	=	1705.00	
519 @ 7.50	=	3892.50	
300 @ 1.50	=	+ 450.00	
		$8999.90	Total inventory at retail

```
 $  8999.90
   ×    .25
 ---------
    4499950
   1799980
 ---------
 $2249.9750   Total markup
```

```
 $8999.90
 - 2249.98
 ---------
 $6749.92   Total inventory at cost
```

b.

230 @ $2.50	=	$ 575.00	
120 @ 5.00	=	600.00	
262 @ 2.50	=	655.00	
154 @ 5.75	=	885.50	
300 @ 1.00	=	+ 300.00	
		$3015.50	Total inventory at cost

4.

a.	6	d.	4
b.	2	e.	1
c.	5	f.	3

5. a. FIFO — First items placed in stock are the first ones taken out
   b. LIFO — Newest items placed in stock are the first ones taken out

ANSWERS TO TEST

6.

January 1	$ 20,000
February 1	19,000
March 1	19,000
April 1	18,500
May 1	18,000
June 1	19,500
July 1	22,000
August 1	26,000
September 1	26,000
October 1	22,000
November 1	20,000
December 1	19,500
December 31	19,288
	$268,788

```
   $ 20,676
13 $268,788
    26
     87
     78
      98
      91
       78
       78
        0
```

7. a. 3

b. 2

8. a. 5:1
b. 5:1

9. a. Cost of merchandise
b. Overhead expenses
c. Desired margin

10. a.

```
 $10.95
 - 6.95
 $ 4.00
```

b.

```
          $3.00
.85%  2.55%00
        255
```

c.

```
 $115
 + 15
 $130
```

d.

```
 $6.50
 - 4.00
 $2.50
```

e.

```
 $60.00
 - 52.00
 $ 8.00
```

ANSWERS TO TEST

f.
$4.00
− 3.25
$ .75

g.
1.00 = 100%
$25.00% $25.00%00
2500

h.
.40 = 40%
$50.00% $20.00%00
20000

i.
$7.25
− 2.00
$5.25

j.
$ 15.95
× .75
7975
11165
$11.96.25 = $11.96

11. a, c, d, e, i, j

12.

Net sales	$600,000
Cost of Goods Sold	− 300,000
Gross Margin	300,000
Operating Expenses	− 95,000
Net Profit Before Income Taxes	$205,000

13. Any six of the following:
    a. Improper receiving of merchandise
    b. Pilferage
    c. Failure to bill merchandise
    d. Error in billing
    e. Breakage, spoilage, shrinkage
    f. Incorrect physical inventory count
    g. Discount and markdown
    h. Obsolescence
    i. Inaccurate weights and measures
    j. Transfers not recorded
    k. Shoplifting

14. a. 1, 4, 5, 6
    b. 1, 4, 5, 6

15. a, b, c, d, f, h

16.-18. Evaluated to the satisfaction of the instructor

CUSTOMER CREDIT
UNIT V

UNIT OBJECTIVE

After completion of this unit, the student should be able to match types of credit with their characteristics, complete a list of methods of evaluating the credit application, calculate simple interest, and complete a credit application. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to customer credit with their correct definitions.
2. Complete a list of statements concerning advantages of credit.
3. List disadvantages of credit.
4. Match types of credit with their characteristics.
5. Select factors that determine the cost of credit.
6. Solve a problem using the formula for calculating interest.
7. Solve a problem using the formula for calculating annual rate of interest.
8. Select true statements concerning uses of the credit application.
9. Complete a list of tips for filling out a credit application.
10. Select information requested on a credit application.
11. Complete a list of methods of evaluating the credit application.
12. List two reasons for a credit policy.

OBJECTIVE SHEET

13. Select true statements concerning ways to maintain effective credit policies.
14. Select information included on a monthly statement.
15. Complete a list of purposes of a monthly statement.
16. Calculate interest.
17. Complete a credit application.

CUSTOMER CREDIT
UNIT V

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Invite a representative from the credit bureau to class to discuss the activities of the credit bureau.

VII. Have students interview a credit manager of an area agribusiness and report about credit policies to class.

VIII. Invite a banker to class to discuss the various types of interest available and their advantages and disadvantages.

IX. Have students choose a large piece of equipment to purchase, have them find out the price, and then figure the cost if various interest rates and credit methods are used.

X. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Credit Application

    2. TM 2 — C's of Credit

    3. TM 3 — Sample Credit Policy

    4. TM 4 — Monthly Statement

INSTRUCTIONAL MATERIALS

D. Assignment sheets

1. Assignment Sheet #1 — Calculate Interest

2. Assignment Sheet #2 — Complete a Credit Application

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Reeves, JoAnn. *Basic Retail Credit.* Austin, TX: Instructional Materials Center, University of Texas at Austin, 1976.

B. *Competency-Based Curriculum for Marketing and Distributive Education.* Memphis, TN: Marketing and Distributive Education Department, Memphis State University.

C. *Agricultural Business Money Management.* Columbus, OH: Agricultural Education Service, Department of Agricultural Education, The Ohio State University, 1976.

D. Lee, Delene and Jasper S. Lee. *Agribusiness Procedures and Practices.* New York: McGraw-Hill Book Co., 1980.

E. Carlile, Robert. *Agriculture Sales and Service.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

CUSTOMER CREDIT
UNIT V

INFORMATION SHEET

I. **Terms and definitions**

A. Aging an account — Process for keeping track of and collecting overdue accounts

B. Amortized — Regular schedule of payment of the loan

C. Appraisal — A fair market value given on personal property

D. Capital — The property the customer owns

E. Collateral — Livestock, land, and other personal property used to secure the loan

F. Credit — Allows the customer to purchase goods and services in return for a promise to pay later

G. Credit application — A form used by firms to gather information that will be used in determining whether or not to grant credit

H. Credit Bureau — An agency that collects and keeps information on consumers that is used to determine whether or not to grant credit

I. Creditor — The person or firm to which one owes money

J. Down payment — The amount of money given the creditor as the first payment

K. Finance charge — Amount of money charged to customer by creditor for goods and/or services purchased on credit

L. Interest rate — Percentage charged for the use of money

M. Maturity — Date the loan is to be paid in full

N. Mortgage — A written claim listing the collateral to secure the loan

O. Principal — Amount of money borrowed

P. Usry law — Law which prohibits lender from charging the borrower an interest rate in excess of legal rate for the use of money

INFORMATION SHEET

II. Advantages of credit

A. To a business

1. Confidence is established between business and customers
2. Business is provided with a mailing list of credit customers
3. Business's margin can increase with credit
4. New customers are obtained through the availability of credit

B. To the individual

1. Large amounts of cash do not need to be carried
2. Keeping records of purchases is easier
3. Purchases can be made before cash is available
4. Partial payments may be made to pay for large purchases over a period of time

C. To our economy

(NOTE: 95% of Americans use some form of credit.)

1. Standard of living is raised since customers are allowed to enjoy merchandise while paying for it
2. Necessary balance between supply and demand is created
3. Credit smoothes business cycles

III. Disadvantages of credit

A. To the business

1. More merchandise is purchased than customer is capable of paying for
2. It costs the business money to offer a credit service

   Examples: Bookkeeping, statement forms, additional personnel
3. A business must be careful in selecting credit customers to avoid losses from delinquent accounts

INFORMATION SHEET

4. Money that is tied up in "accounts receivable" cannot be used for other purposes in the company

5. With large amounts of money tied up in the charge accounts, the dealer may have to go to the bank to borrow money to operate the business and this borrowed money costs the dealer interest

6. If it is necessary to take a case to court to collect from a customer, it will cost the business money in court costs and attorney fees

B. To the individual

1. More merchandise is purchased than customer is capable of paying for

2. Purchases are too easy to make and individual may buy more than he/she realizes

3. Many times interest rates are higher than those from lending agencies

IV. Types of credit and their characteristics

A. 30-day open charge account — Bill is expected to be paid in full within 10 to 15 days of receipt; if not paid in full a finance charge is added

B. 90-day charge account — May require a down payment of 1/3 total price and balance is divided into three equal payments; no carrying charge is paid unless payments are in default

C. Installment credit — Type of credit in which the debt is paid off in a series of equal payments

(NOTE: Always examine an installment contract very carefully because it is legally binding.)

D. Revolving charge account — Bill may be paid within 30 days of billing date or if full amount is not paid, a finance charge previously set in charge agreement will be added to unpaid balance

(NOTE: The appeal of a revolving charge account is that the customer can charge up to a predetermined amount.)

V. Factors that determine the cost of credit

A. Cost of investigating information given on a credit application

B. Cost of money borrowed to underwrite use of credit by customers

INFORMATION SHEET

C. Service cost of making records, keeping records, and collecting

(NOTE: Service charges may be separate from interest charges.)

D. Credit losses due to uncollectable accounts which are written off as expenses

VI. Formula for calculating interest

Principal (P) × Rate of Interest (R) × Time (T) = Interest (I)

Examples: Interest on a $1,000 one-year, 12% loan is calculated as

$$\begin{array}{ccccccc} (P) & \times & (R) & \times & (T) & = & (I) \\ \$1{,}000 & \times & 0.12 & \times & 1 & = & \$120 \end{array}$$

or

Interest on a $1,000, four month, 12% loan is calculated as

$$\$1{,}000 \times 0.12 \times \frac{4}{12} = \$40$$

or

Interest on a $1,000, 60-day, 12% loan is calculated as

$$\$1{,}000 \times 0.12 \times \frac{60}{360} = \$20$$

(NOTE: When making calculations, assume that a year contains 360 days. In determining exact number of days on loan, do not include day note is dated; the day on which a loan falls due is included.)

VII. Formula for calculating annual rate of interest

$$\frac{\text{Total of Finance Charges}}{\text{1/2 Original Loan}} \times \frac{\text{No. of Payments}}{\text{No. of Years}} \times \frac{1}{\text{No. of Payments Plus 1}} \times 100 = \text{True Annual Rate of Interest}$$

Example: A business person borrowed $8,000.00 which cost $400.00 for 24 months. What was the interest rate?

$$\frac{\$400}{4{,}000} \times \frac{24}{2} \times \frac{1}{25} \times 100 = 4.8\% \text{ Interest}$$

INFORMATION SHEET

VIII. **Uses of the credit application**

A. Provides permanent record of potential customer

B. Aids in investigating ability of customer to repay loan

C. Serves as a legal document, when signed, to establish legal responsibility of customer to pay

D. Explains terms of credit

E. Helps determine customer's credit limit

IX. **Tips for filling out a credit application**

A. Read the application carefully

B. Use ink so no fact can be altered

C. Write legibly

D. Provide complete, accurate, information

E. Realize it is a legal commitment when signed

X. **Information requested on a credit application** (Transparency 1)

A. Name and address of customer

B. Owns home or rents (mortgage information)

C. How long at present address

D. Number of children or dependents

E. Bank accounts and other investments

F. Where employed and for how long

G. Prior employment record

H. Other places where credit is held

I. References

J. Present income

K. Amount of credit requested

INFORMATION SHEET

- L. Approval of application
- M. Applicant's signature

XI. Methods of evaluating the credit application

- A. Follow the C's of credit (Transparency 2)
  - 1. Character — The customer's honesty and willingness to pay
  - 2. Capacity — The customer's ability to earn
  - 3. Capital — The property the customer owns
  - 4. Collateral — The property owned by the customer which is used to "back up" a loan
- B. Ask questions to evaluate applicant
  - 1. Who is the applicant
  - 2. What does the applicant do
  - 3. Will the applicant be able to pay
  - 4. Can payment be forced
- C. Use the credit bureau to determine
  - 1. How promptly one pays bills
  - 2. If one has been refused credit
  - 3. How often one has been granted credit
  - 4. Criminal record of individual, if any

    (NOTE: Individuals have access to their personal file and the bureau must keep a record of who has seen the file within the last six months.)

XII. Reasons for a credit poiicy (Transparency 3)

- A. To determine the amount of credit to be granted
- B. To determine the terms on which credit is to be granted

INFORMATION SHEET

XIII. **Ways to maintain effective credit policies**

A. Screen credit applicants carefully

B. Make sure terms are easily understood by applicant

Examples: Who is eligible for credit, conditions, interest rate

C. Keep accurate records

D. Follow up past due accounts promptly

E. Prevent additional credit on past due accounts

F. Provide counseling to seriously over-extended customers

G. Use legal actions sparingly, but decisively

XIV. **Information included on a monthly statement** (Transparency 4)

A. The date when the statement is mailed

B. A place for the name and address of the customer

C. A statement to pay the last amount in the balance account

D. A statement of the service charges that are applied on account balances that are past due

E. A column for date, item, charges, credits, and balance

F. A line for a "balance" carried forward from the previous month

XV. **Purposes of a monthly statement**

A. To serve as a reminder to the customer of the current balance that is owed

B. To provide business with a permanent record of customer charges

C. To provide customer with a record of all purchases charged and paid once a month

(NOTE: This provides the customer with an excellent income tax record.)

D. To restate charges for the month to allow for corrections if an error occurs in billing

EA - 217-C

Credit Application

Purchaser's Statement – For Agricultural, Business or Commercial use of equipment

Purchaser's Name & Address	(City)	(County)	(State)	(Zip Code)
Telephone Area Code ( )	Date of Birth	Social Security Number (or IRS Number)	How long at present address?	
Spouse's Name and Occupation (Necessary only if spouse is to be a co-debtor)		Number of dependents	☐ Own Home ☐ Rent	
Previous Address (If you have resided at the above address less than two years)				
Purchaser is Individual ☐ Partnership ☐ Corporation ☐		Business Telephone Area ( )	Yrs. in farming (or business)	

Complete all appropriate sections. If information requested is not applicable or not available, indicate so.

AGRICULTURAL USE - Complete this section if equipment is for agricultural use

Equipment Purchased For Custom Work? Yes ☐ No ☐		Net Income Last Year		Estimated Income This Year	Equipment on Lease? No ☐ Yes ☐	Annual Payments $ ______
Seasonal Income: Crops	No. of Acres	Est. Income	Est. Income Date	**Livestock Income**	Estimated Income	Est. Income Date
1				1		
2				2		
3				3		

Estimated Monthly Milk Income $	Milk is sold to (Name & Address)
Estimated Other Monthly Income $	Source of Other Income

Use of Irrigation	All Crops ☐	Some Crops ☐	Do Not Use ☐	Number of Irrigated Acres	Number of Acres being Rented	Annual Rental Payments $

BUSINESS OR COMMERCIAL USE - Complete this section if equipment is for Business or Commercial Use

Equipment will be used for ▶	Landscaping ☐	Nursery ☐	Lawn Care ☐	Other ☐	Net Income Last year $	Est. Income This Year $	Equipment on Lease? No ☐ Yes ☐	Annual Payments $ ______

Specify Sources of Income during Next 12 Months

1 Estimated Amount $ ______

2 Estimated Amount $ ______

FINANCIAL STATEMENT - To be completed if equipment is to be used for Agriculture, Business or Commercial Use

Assets (Statement as of ______, 19__) **Liabilities**

Machinery & Equipment	$	Owe on Machinery & Equipment Owed to John Deere	$
		(Others)	
No. of Autos ____, No. of Trucks ____, Est. Value		Owe on Autos and Trucks	
Cash on Hand and in Bank		Accounts Payable (Unsecured)	
Stocks and Bonds (Estimated Market Value)		Secured Accounts owed to Others	
Notes and Accounts Receivables		(Secured by)	
Real Estate Owned (Estimated Value)		Owe Mortgages on Real Estate	
Livestock (Agricultural)		(Mortgages held by) ______	
Harvested Crops For Sale			
Other Assets ______		All Other Debts ______	
Total Assets		**Total Liabilities**	

CREDIT REFERENCES	Town & State	Person to Contact	Account Number	Telephone No
(PCA, SBA or FHA Loan) 1				Area ( )
(Finance or Credit Company) 2				Area ( )
3				Area ( )
4				Area ( )
Bank With				Area ( )

For the purpose of obtaining credit, I (we) affirm that the above is a true statement of my (our) affairs as of this date:

______ (Purchaser's Signature) ______ (Date) ______ (Co-debtor's Signature) ______ (Date)

EA - 219-C

C's of Credit

C

APITAL

APACITY

HARACTER

OLLATERAL

TM 2

Sample Credit Policy

Smith Brothers Welcomes Your Charge Business

In order that we may extend our valuable credit to you, it is necessary for you to be employed and to have a satisfactory history of prompt credit payments.

We Offer You

1. Revolving accounts: Agreed monthly payment due 10 days after receipt of statement. The unpaid balance from statement of previous month carries a $1^1/_2$ percent service charge.
2. Thirty day accounts: Due when statement is rendered. Payment is late after tenth of month.
3. Deferred Payment: Due monthly on date agreed upon. Payment is late thereafter.
4. Payday Accounts: Due each payday. Payment is overdue the following payday.

Our books close on the 28th of each month. Statements are mailed monthly. We report both prompt and delinquent payment to the local credit bureau.

Please notify us if you have a change of address.

Monthly Statement

STATEMENT

BATES' FEED AND SEED
PHONE: 555-2000

- DEAERS IN -

Grain, Seed, Feed, Fertilizer, and Building Material

STILLWATER, OKLAHOMA February 1 19 84

John Farmer
Route 2
Stillwater, Okla. 74074

ALL CHARGES DUE AND PAYABLE 20TH OF MONTH FOLLWING PURCHASE

All past due accounts will be charged 1½ % Carrying charge per mo. until paid. This is 12 to 24% per year.

DATE		ITEM	CHARGES		CREDITS		BALANCE	
		BALANCE FORWARD						00
1	10	Feed & Grinding	48	92			48	92
1	12	Sh. Corn & Grinding						
		- Hog Supp.	41	25			90	17
1	15	30 bushel wheat	172	50			262	67
1	18	30 T. Lime	240	00			502	67
1	23	Feed & Grinding	48	50			551	17

PAY LAST AMOUNT IN THIS COLUMN

CUSTOMER CREDIT
UNIT V

ASSIGNMENT SHEET #1 — CALCULATE INTEREST

Directions: Solve the following problems on calculating interest.

(NOTE: Refer to information provided in objectives VI and VII of this unit for assistance in completing the assignment sheet.)

1. How much interest would be paid for the use of $360.00 for one year at 12% interest?

2. How much interest would be paid for the use of $500.00 for 90 days at 16% interest?

3. How much interest would be paid for the use of $1,000.00 for six months at 18% interest?

4. If a person borrows $2,000 for a used truck, pays $68.89 per month for 36 months, how much interest has been paid? What is the annual rate of interest for the loan?

CUSTOMER CREDIT
UNIT V

ASSIGNMENT SHEET #2 — COMPLETE A CREDIT APPLICATION

Directions: Fill out the following credit application as if you were planning to buy a major piece of farm equipment.

228-C

ASSIGNMENT SHEET #2

Purchaser's Statement – For Agricultural, Business or Commercial use of equipment

Purchaser's Name & Address	(City)	(County)	(State)	(Zip Code)	
Telephone Area Code ( )	Date of Birth	Social Security Number (or IRS Number)	How long at present address?		
Spouse's Name and Occupation (Necessary only if spouse is to be a co-debtor)		Number of dependents	☐ Own Home ☐ Rent		
Previous Address (If you have resided at the above address less than two years)					
Purchaser is	Individual ☐	Partnership ☐	Corporation ☐	Business Telephone Area ( )	Yrs. in farming (or business)

Complete all appropriate sections. If information requested is not applicable or not available, indicate so.

AGRICULTURAL USE - Complete this section if equipment is for agricultural use

Equipment Purchased For Custom Work? Yes ☐ No ☐		Net Income Last Year		Estimated Income This Year	Equipment on Lease? No ☐ Yes ☐	Annual Payments $	
Seasonal Income: Crops	No. of Acres	Est. Income	Est. Income Date	**Livestock Income**	Estimated Income	Est. Income Date	
1				1			
2				2			
3				3			
Estimated Monthly Milk Income $	Milk is sold to (Name & Address)						
Estimated Other Monthly Income $	Source of Other Income						
Use of Irrigation	All Crops ☐	Some Crops ☐	Do Not Use ☐	Number of Irrigated Acres	Number of Acres being Rented	Annual Rental Payments $	

BUSINESS OR COMMERCIAL USE - Complete this section if equipment is for Business or Commercial Use

Equipment will be used for ▶	Landscaping ☐	Nursery ☐	Lawn Care ☐	Other ☐	Net Income Last year $	Est. Income This Year $	Equipment on Lease? No ☐ Yes ☐	Annual Payments $
Specify Sources of income during Next 12 Months 1							Estimated Amount $	
2							Estimated Amount $	

FINANCIAL STATEMENT - To be completed if equipment is to be used for Agriculture, Business or Commercial Use

Assets (Statement as of ______________ 19___) **Liabilities**

Machinery & Equipment	$	Owe on Machinery & Equipment Owed to John Deere	$
		(Others)	
No. of Autos _____ No. of Trucks _____ Est. Value		Owe on Autos and Trucks	
Cash on Hand and in Bank		Accounts Payable (Unsecured)	
Stocks and Bonds (Estimated Market Value)		Secured Accounts owed to Others	
Notes and Accounts Receivables		(Secured by)	
Real Estate Owned (Estimated Value)		Owe Mortgages on Real Estate	
Livestock (Agricultural)		(Mortgages held by) ______________	
Harvested Crops For Sale			
Other Assets ______________		All Other Debts ______________	
Total Assets		**Total Liabilities**	

CREDIT REFERENCES	Town & State	Person to Contact	Account Number	Telephone No.
(PCA, SBA or FHA Loan) 1				Area ( )
(Finance or Credit Company) 2				Area ( )
3				Area ( )
4				Area ( )
Bank With				Area ( )

For the purpose of obtaining credit, I (we) affirm that the above is a true statement of my (our) affairs as of this date:

(Purchaser's Signature) (Date) (Co-debtor's Signature) (Date)

CUSTOMER CREDIT
UNIT V

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

1. $\$360.00 \times 12\% \times 1 = \$43.20$

2. $\$500 \times 16\% \times \dfrac{90}{360} = \$20$

3. $\$1{,}000 \times 18\% \times \dfrac{6}{12} = \$90$

4. a. $\$68.89 \times 36 = \$2{,}480.04 - \$2{,}000.00 = \$480.04$

   b. $\dfrac{\$480.04}{1{,}000} \times \dfrac{36}{3} \times \dfrac{1}{37} \times 100 = 15.5\%$

Assignment Sheet #2 — Evaluated to the satisfaction of the instructor

CUSTOMER CREDIT
UNIT V

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

______a. A written claim listing the collateral to secure the loan

______b. A form used by firms to gather information that will be used in determining whether or not to grant credit

______c. Date the loan is to be paid in full

______d. Regular schedule of payment of the loan

______e. Allows the customer to purchase goods and services in return for a promise to pay later

______f. Law which prohibits lender from charging the borrower an interest rate in excess of a legal rate for the use of money

______g. Percentage charged for the use of money

______h. The amount of money given the creditor as the first payment

______i. Amount of money borrowed

______j. Process for keeping track of and collecting overdue accounts

______k. The person or firm to which one owes money

______l. Livestock, land, and other personal property used to secure the loan

______m. A fair market value given on personal property

______n. The property the customer owns

______o. An agency that collects and keeps information on consumers that is used to determine whether or not to grant credit

______p. Amount of money charged to customer by creditor for goods and/or services purchased on credit

1. Interest rate
2. Appraisal
3. Amortized
4. Mortgage
5. Principal
6. Capital
7. Credit
8. Creditor
9. Credit Bureau
10. Maturity
11. Usry law
12. Collateral
13. Down payment
14. Credit application
15. Aging an account
16. Finance charge

TEST

2. Complete the following list of advantages of credit.

   a. To a business

      1) ____________________ is established between business and customers

      2) Business is provided with a ____________________ of credit customers

      3) Business's ____________________ can increase with sales

      4) New ____________________ are obtained through the availability of credit

   b. To the individual

      1) Large amounts of ____________________ do not need to be carried

      2) Keeping ____________________ of purchases is easier

      3) Purchases can be made before cash is available

      4) ____________________ payments may be made to pay for large purchases over a period of time

   c. To our economy

      1) ____________________ is raised since customers are allowed to enjoy merchandise while paying for it

      2) Necessary ____________________ between supply and demand is created

      3) Credit smooth's business ____________________

3. List two disadvantages of credit to the business and to the individual.

   a. To the business

      1) ____

      2) ____

TEST

b. To the individual

1) ____

2) ____

4. Match the types of credit on the right with their characteristics.

_____a. Type of credit in which the debt is paid off in a series of equal payments

_____b. May require a down payment of 1/3 total price and balance is divided into three equal payments; no carrying charge is paid unless payments are in default

_____c. Bill may be paid within 30 days of billing date or if full amount is not paid, a finance charge previously set in charge agreement will be added to unpaid balance

_____d. Bill is expected to be paid in full within 10 to 15 days of receipt; if not paid in full, a finance charge is added

1. Installment credit
2. 30-day open charge account
3. Revolving charge account
4. 90-day charge account

5. Select factors that determine the cost of credit by placing an "X" in the appropriate blanks.

_____a. Cost of investigating information given on a credit application

_____b. Cost of money borrowed to underwrite use of credit by customers

_____c. Service cost of making records, keeping records, and collecting

_____d. Credit losses due to uncollectible accounts which are written off as expenses

6. Solve the following problem using the formula for calculating interest.

Bill borrowed $2,500 from the local bank to buy a computer to help manage his farm supply business. He plans to pay the loan off in one year and is paying 18% interest on the loan. How much interest will he pay?

TEST

7. Solve the following problem using the formula for calculating annual rate of interest.

John Smith bought a used hay baler for $1,200 from the local implement dealer. John paid $200 down with 12 monthly payments for the remaining $1,000 plus 12% interest, making the total owed $1,120. What is the annual rate of interest?

8. Select true statements concerning uses of the credit application by placing an "X" in the appropriate blanks.

_____a. Provides a temporary record of potential customer

_____b. Aids in investigating ability of customer to repay loan

_____c. Serves as a legal document, when signed, to establish legal responsibility of customer to pay

_____d. Explains terms of credit

_____e. Helps determine customer's credit limit

9. Complete the following list of tips for filling out a credit application.

a. ____________________ the application carefully

b. Use ____________________ so no fact can be altered

c. Write ____________________

d. Provide complete, ____________________ information

e. Realize it is a legal document when ____________________

10. Select information requested on a credit application by placing an "X" in the appropriate blanks.

_____a. Name and address of customer

_____b. Owns home or rents

_____c. How long at present address

_____d. Past income

_____e. Where employed and for how long

TEST

______f. Number of years married

______g. Other places where credit is held

______h. References

______i. Credit manager's signature

______j. Applicant's signature

11. Complete the following list of methods of evaluating the credit application.

    a. Follow the C's of credit

        1) ______________________ — The customer's honesty and willingness to pay

        2) Capacity — The customer's ability to ______________________

        3) Capital — The ______________________ the customer owns

        4) ______________________ — The property owned by the customer which is used to "back up" a loan

    b. Ask questions to evaluate applicant

        1) Who is the applicant

        2) What does the applicant do

        3) Will the applicant be able to ______________________

        4) Can ______________________ be forced

    c. Use the credit bureau to determine

        1) How ______________________ one pays bills

        2) If one has been refused ______________________

        3) How often one has been granted credit

        4) ______________________ record of individual

12. List two reasons for a credit policy.

    a. ____

    b. ____

TEST

13. Select true statements concerning ways to maintain effective credit policies by placing an "X" in the appropriate blanks.

_____a. Screen credit applicants carefully

_____b. Make sure terms are hard to understand by applicant

_____c. Keep accurate records

_____d. Follow up past due accounts slowly

_____e. Provide additional credit on past due accounts

_____f. Provide counseling to seriously over-extended customers

_____g. Use legal actions sparingly, but decisively

14. Select information included on a monthly statement by placing an "X" in the appropriate blanks.

_____a. The date when the statement is typed

_____b. A place for the name and address of the customer

_____c. A statement to pay the first amount in the balance column

_____d. A statement of the service charges that are applied on account balances that are past due

_____e. A column for date, item, charges, credits, and balance

_____f. A line for a "balance" carried forward from the previous month

15. Complete the following list of purposes of a monthly statement.

a. To serve as a ____________________ to the customer of the current balance that is owed

b. To provide ____________________ with a permanent record of customer charges

c. To provide customer with a record of all purchases charged and paid ____________________

d. To restate charges for the month to allow for ____________________ if an error occurs in billing

TEST

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

16. Calculate interest.

17. Complete a credit application.

CUSTOMER CREDIT
UNIT V

ANSWERS TO TEST

1.

a.	4	g.	1	m.	2
b.	14	h.	13	n.	6
c.	10	i.	5	o.	9
d.	3	j.	15	p.	16
e.	7	k.	8		
f.	11	l.	12		

2. a.
    1) Confidence
    2) Mailing list
    3) Margin
    4) Customers

   b.
    1) Cash
    2) Records
    4) Partial

   c.
    1) Standard of living
    2) Balance
    3) Cycles

3. a. Any two of the following:

    1) More merchandise is purchased than customer is capable of paying for
    2) It costs the business money to offer a credit service
    3) A business must be careful in selecting credit customers to avoid losses from delinquent accounts
    4) Money that is tied up in "accounts receivable" cannot be used for other purposes in the company
    5) With large amounts of money tied up in the charge accounts, the dealer may have to go to the bank to borrow money to operate the business and this borrowed money costs the dealer interest
    6) If it is necessary to take a case to court to collect from a customer, it may cost the business money in court costs and attorney fees

   b. To the individual

    1) More merchandise is purchased than customer is capable of paying for
    2) Purchases are too easy to make and individual may buy more than he/she realizes
    3) Many times interest rates are higher than those from lending agencies

4. a. 1
   b. 4
   c. 3
   d. 2

ANSWERS TO TEST

5. All are correct

6. $450

7. 22.18%

8. b, c, d, e

9. a. Read
   b. Ink
   c. Legibly
   d. Accurate
   e. Signed

10. a, b, c, e, g, h, j

11. a. 1) Character
       2) Earn
       3) Property
       4) Collateral

    b. 3) Pay
       4) Payment

    c. 1) Promptly
       2) Credit
       4) Criminal

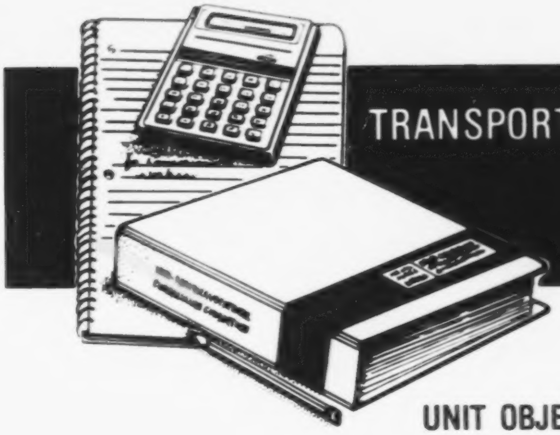
12. a. To determine the amount of credit to be granted
    b. To determine the terms on which credit is to be granted

13. a, c, f, g

14. b, d, e, f

15. a. Reminder
    b. Business
    c. Once a month
    d. Corrections

16-17. Evaluated to the satisfaction of the instructor



TRANSPORTATION AND WAREHOUSING
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete a list of statements concerning government agencies that regulate transportation and select true statements concerning proper handling and storage practices. The student should also be able to complete a worksheet on selecting transportation and sketch a floor plan for a warehouse. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to transportation and warehousing with their correct definitions.
2. Match common types of transportation with their characteristics.
3. Complete a list of factors to consider in selecting transportation.
4. Match common types of transportation with their advantages/disadvantages.
5. Complete a list of statements concerning government agencies that regulate transportation.
6. List four reasons for warehousing.
7. Select traits of a modern warehouse.
8. Complete a list of factors to consider in planning a floor layout.
9. Match types of warehouse equipment with their correct definitions.
10. Match safety color codes with their uses.

OBJECTIVE SHEET

11. Select true statements concerning proper handling and storage practices.
12. Complete a list of statements concerning handling and storage of hazardous materials.
13. Select true statements concerning practices and procedures for storing food.
14. Complete a worksheet on selecting transportation.
15. Sketch a floor plan for a warehouse.

TRANSPORTATION AND WAREHOUSING
UNIT I

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Discuss state and federal transportation laws with class.

VII. Discuss legal ways of transporting agricultural machinery on highways and state/county roads. Invite a local highway patrolman to participate in the discussion.

VIII. Take students on a field trip to several agribusiness warehouses to study proper warehouse layouts. Discuss use of color coding.

IX. Obtain and show slide presentation on safety color coding which is available through the American Association for Vocational Instructional Materials.

X. Invite a warehouse manager from an area agribusiness to discuss proper handling and storage practices.

XI. Visit a grain elevator and discuss transportation of grain with manager.

XII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Types of Warehouse Storage Equipment

    2. TM 2 — Standard Pallet Patterns

INSTRUCTIONAL MATERIALS

D. Assignment sheets

1. Assignment Sheet #1 — Complete a Worksheet on Selecting Transportation

2. Assignment Sheet #2 — Sketch a Floor Plan for a Warehouse

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Wolf, Dr. Willard. *Marketing Agricultural Products.* Columbus, OH: Ohio Agricultural Education Curriculum Materials Service, The Ohio State University, 1976.

B. *Physical Distribution.* Austin, TX: Instructional Materials Center, University of Texas at Austin, 1979.

C. Walsh, Lawrence A. *Wholesaling and Physical Distribution.* New York: McGraw-Hill Book Company, 1978.

III. Additional reference — Slide presentation. "Safety Color Coding for the Shop." 1982. American Association for Vocational Instructional Materials, Engineering Center, Athens, GA 30602.

TRANSPORTATION AND WAREHOUSING
UNIT I

INFORMATION SHEET

I. **Terms and definitions**

   A. Carload lots — Shipment that completely fills a freight car and is charged lower rates

   B. Carrier — An individual or organization engaged in transporting goods for a fee

   C. C.O.D. — Cash on delivery

   D. Commodities — Products of agriculture or mining such as grains or coal

   E. Containerization — To ship goods in sealed, portable containers by rail, road, air, or sea

   F. Fire wall — A wall constructed to prevent the spread of fire

   G. F.O.B. — Free on board; without charge for delivery to and placing on board a carrier at a specified point

   H. Less than carload lots — Shipment that does not fill a freight car and will cost higher rates than a carload lot

   I. Piggyback — To ship goods or commodities already in a trailer or a flat car

   J. Shipper — An individual or organization that sends goods by means of a carrier

   K. Warehouse — A structure or building used in the storage of merchandise or commodities

   L. Warehousing — The practice of receiving, storing, and stocking merchandise or commodities

II. **Common types of transportation and their characteristics**

   A. Railroads

      1. Haul all types of products and commodities

      2. Can ship in carload lots or less than carload lots

      3. Provide containerization and piggyback service to shippers who need it

INFORMATION SHEET

B. Motor carriers

  1. Haul all types of products and commodities

  2. Provide four types of service which include

    a. Common carriers

    b. Contract carriers

    c. Private carriers

    d. Exempt carriers

C. Water carriers

  1. Used to transport heavy, bulky commodities and products that have low perishability

  2. Operate on navigable rivers, canals, and lakes

D. Airfreight

  1. Used to transport items that are

    a. Light in weight

    b. Small in size

    c. High in value

  2. Provides fast service for highly perishable products such as fresh flowers, fresh seafood, and emergency medication

E. Pipelines

  1. Carry oil, gas, and chemicals

  2. Can carry ore, gravel, and grain in a water slurry

F. Parcel post (U.S. Postal Service)

  1. Provides service for carrying letters and small packages

  2. Provides special services at a nominal charge

  Examples: Insured mail, special delivery, registered mail, express mail

INFORMATION SHEET

G. Private parcel carriers

(NOTE: Check each state for private parcel carrier availability.)

Examples: United Parcel Service (UPS), Air Express

1. Provide door-to-door service
2. Charge includes insurance for loss or damage
3. May provide next day delivery within 150 to 400 miles of pickup point

III. Factors to consider in selecting transportation

A. Equipment and services offered by carrier

B. Reliability of carrier

C. Cost as compared to other types of transportation

D. Length of time it takes to deliver products

E. Delivery points

IV. Advantages/disadvantages of common types of transportation

A. Railroads

1. Advantages
    a. Reliable
    b. Able to haul quantity of bulky commodities
    c. Takes fewer people to haul large loads
    d. Lower rates than motor carrier
2. Disadvantages
    a. Delays may be caused by switching cars at freight yards
    b. Small quantities are more expensive to ship
    c. Slow speed of transportation

INFORMATION SHEET

B. Motor carriers

  1. Advantages

    a. Convenient; loads directly from warehouse

    b. Can reach even the most remote areas as long as there is a decent road

    c. Generally does not require special packaging

  2. Disadvantages

    a. High cost of loading and unloading small shipments

    b. Frequently carrier must make return trip partially loaded or empty

C. Water carriers

  1. Advantages

    a. Low cost

    b. Large quantities of bulky commodities such as grain and coal can be shipped at one time

    c. Negotiable rate

  2. Disadvantages

    a. Slow service

    b. Limited to products with low perishability

    c. Delay in delivery caused by bad weather conditions

D. Airfreight

  1. Advantages

    a. Quick, safe service

    b. Product needs less protective packaging

    c. Small quantities may be shipped

INFORMATION SHEET

2. Disadvantages
    a. High rates
    b. Limited in size and weight of shipment
    c. Delay in delivery caused by bad weather conditions

E. Pipelines

1. Advantages
    a. Low cost of maintenance
    b. Unaffected by weather, traffic, and other environmental problems
2. Disadvantages
    a. Area limited by high cost of installation
    b. Service limited to certain types of products

F. Parcel post and private parcel carriers

1. Advantages
    a. Fast
    b. Convenient to use
    c. Reliable
    d. Provide COD services
2. Disadvantages
    a. Limited in size and weight of shipment
    b. Packages must be wrapped properly before shipping

V. **Government agencies that regulate transportation**

A. Interstate Commerce Commission (ICC) — Enforces rules and regulations which carriers that cross the state lines must follow; sets up fair and reasonable rates and classifications

Examples: Safety standards, animal protection rules that relate to shipping

INFORMATION SHEET

B. State Department of Transportation — Enforces laws which carriers that haul within the state must follow

Examples: Licenses and inspection for carriers

C. Civil Aeronautics Board — Regulates airline transportation

VI. **Reasons for warehousing**

A. To store and protect materials and products against theft, fire, flood, heat and cold, insects, and rodents

B. To prepare and arrange materials and products for shipping

C. To receive and distribute materials and products

D. To have a ready supply of products

VII. **Traits of a modern warehouse**

A. Usually is a one-story building

B. Uses pallets and material-handling equipment

C. Uses effective storage layout plans

D. Has a direct flow assembly line for product movement within warehouse

VIII. **Factors to consider in planning a floor layout**

A. Amount of horizontal and vertical space available

B. Size and weight of items to be stored

C. Strength of floor in supporting weight of items

D. Location and size of doors

E. Location of loading dock

F. Location of support beams

G. Storage devices and equipment to be used in warehouse operation

IX. **Types of warehouse equipment** (Transparency 1)

A. Pallet — Wood or metal portable platform for handling, storing, or moving materials in a safe, efficient manner

INFORMATION SHEET

B. Rack — Metal framework in which large items or loaded pallets are stored

Examples: Open racks, closed racks, drum racks, and pipe and steel racks

C. Bin — An enclosed place such as a box or crib which is used for storage

D. Shelf — A thin, flat piece of material fastened horizontally to a wall or within a framework to hold small items

E. Bay — Main division of the warehouse which serves as an open floor storage area

X. **Safety color codes and their uses**

(NOTE: Implementation of a safety color coding system will promote safety and help prevent accidents. Standards for business and industry have been established by the Occupational Safety and Health Administration.)

A. Safety green

1. Applied to nonhazardous parts of machine and equipment surfaces, like nameplates and bearing surfaces
2. Designates safe areas of equipment, and is also used to show location of safety equipment and first-aid materials

B. Safety yellow

1. Applied to operating levers, wheels, handles, and hazardous parts that may cause stumbling, falling, snagging, or tripping
2. Designates caution

C. Safety orange

1. Applied to electrical switches, interior surfaces of doors, fuses and electrical power boxes, and movable guards and parts
2. Indicates dangerous parts of equipment which may cut, crush, shock, or otherwise physically injure someone

D. Safety red

1. Applied to buttons or levers of electrical switches used for stopping machinery, and to all equipment, such as gasoline cans, which are fire hazards
2. Designates fire hazards and fire-fighting equipment

   (NOTE: The color red is also applied to other fire-fighting equipment, such as fire alarms, fire axes, and emergency exits.)

INFORMATION SHEET

E. Safety blue

1. Used to identify equipment which is being repaired or is defective and should not be operated
2. Designates "out of order" or "defective"

F. Safety ivory

1. Applied to label edges, vise jaws, and edges of tool rests where extra light reflection is important
2. No particular designation except to help show tool and equipment moving edges more clearly

G. Safety black on safety yellow

1. Applied to area where radiation is a factor or danger
2. Designates radiation hazards

H. Safety black, safety white, and safety yellow

1. Applied to floors for safety lanes and location of housekeeping supplies
2. The single or combination use of these colors are used to identify traffic flow and housekeeping zones

XI. **Proper handling and storage practices**

A. Keep movement and handling of goods to a minimum

(NOTE: Handling increases cost and creates an added risk of damaging goods.)

B. Use FIFO (first-in-first-out) rotation system

C. Store goods by department or type

D. Locate fast moving goods in an easy access area

E. Mark stock and aisles for accurate and quick identification

F. Store hazardous materials in a separate area away from other goods

G. Keep storage area clean to protect goods from dirt, dust, chemical corrosion, insects, and rodents

H. Store goods in a dry, cool place

(NOTE: Moisture and drastic temperature change may damage goods.)

INFORMATION SHEET

I. Store goods in their original containers to reduce handling and provide protection

J. Stack goods so that a minimum of space is used

(NOTE: Be careful not to stack goods too high as this may damage goods below and create a safety hazard.)

K. Store large or heavy items near doors and leave space for motorized equipment to handle them

L. Use proper patterns of stacking when using a pallet (Transparency 2)

XII. **Handling and storage of hazardous materials**

(NOTE: Check state regulations on proper storage of hazardous materials.)

A. Store toxic chemicals such as insecticides and pesticides in a well ventilated area and check frequently for leaks

B. Store acids away from combustible materials and water, use rubber gloves when handling, and check frequently for leaks

C. Post "NO SMOKING" signs in areas where flammable liquids or materials are stored

D. Combustible materials such as wood and paper should be stored in areas equipped with automatic sprinklers and adequate space should be left between stacks

E. Bulk drums of flammable liquids should be grounded and bonded to containers during dispensing

F. Flammable liquids such as fuel, paint products, and cleaning solvents should be stored in a separate warehouse or separate room divided by fire walls and equipped with a sprinkler system; good ventilation should be provided

G. Flammable liquids should be kept in closed containers when not in use

H. Flammable gases such as oxygen and acetylene should be stored in a separate building with good ventilation; tanks should be stored upright

I. Ag chemicals should be stored separate from feed and seed

J. Metal storage cabinets should be made from a minimum 18 gauge sheet iron and have a double wall with 1 1/2 inches air space

INFORMATION SHEET

XIII. **Practices and procedures for storing food**

A. Store dry-pack items and canned goods in a cool, dry, well ventilated area

B. Store goods on open shelving at least six inches off floor and twelve inches from wall

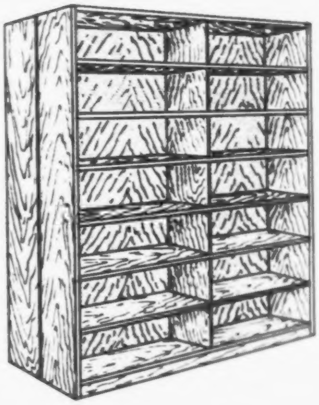
(NOTE: This prevents contamination by floor soil or water and allows for cleaning underneath.)

C. Store food items that need refrigeration in temperatures between 32°F and 50°F

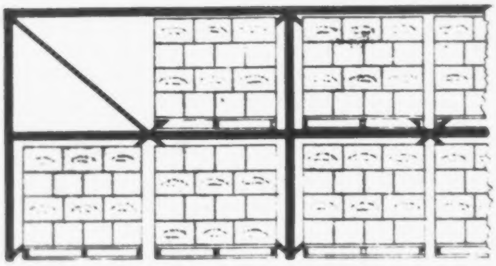
D. Store frozen food items in temperatures between 0°F and −10°F

(NOTE: Frozen food will not keep indefinitely; extended storage time decreases the quality of food product.)

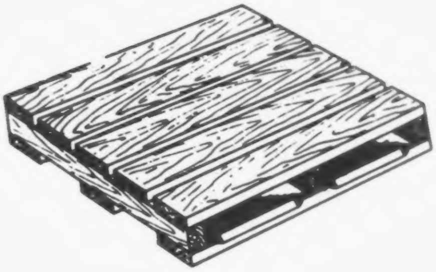
Types of Warehouse Storage Equipment



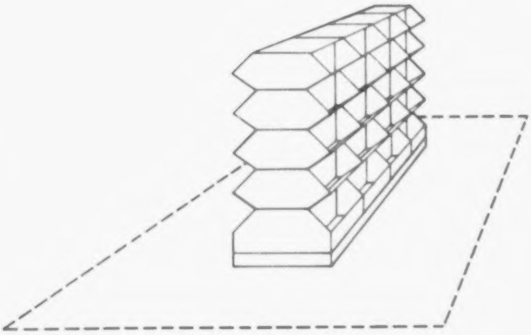
SHELVES



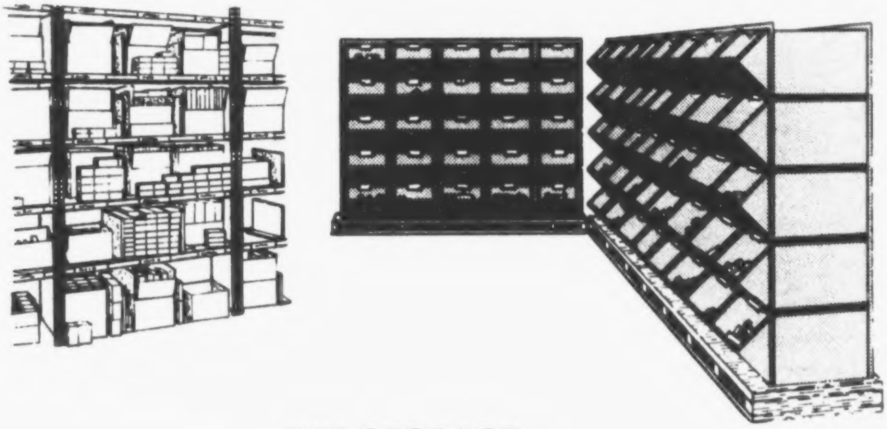
RACK



PALLET

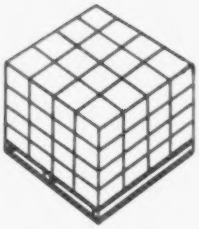


BAY

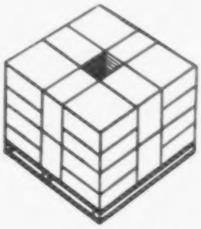


BIN STORAGE

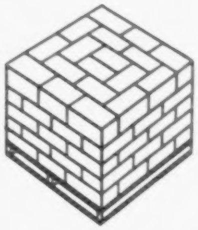
Standard Pallet Patterns



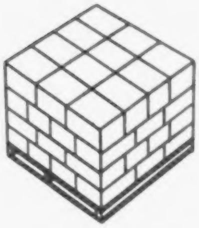
BLOCK



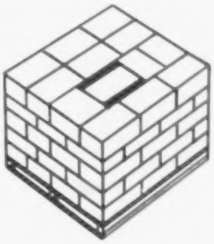
SPLIT BLOCK



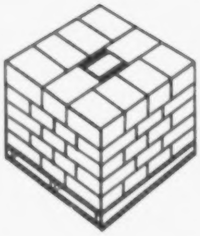
BRICK



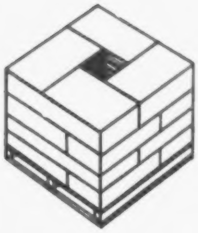
ROW



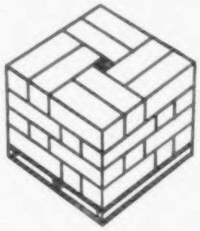
SPLIT ROW



SPLIT ROW



PINWHEEL



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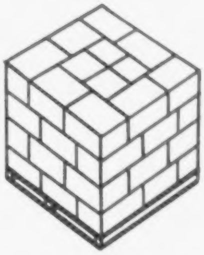

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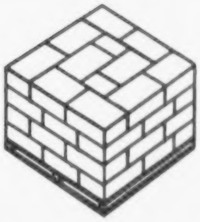
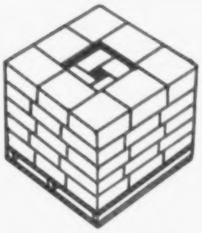


PINWHEEL



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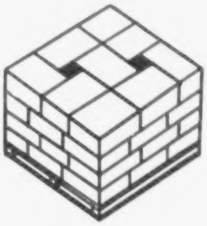


SPLIT PINWHEEL

TRANSPORTATION AND WAREHOUSING
UNIT I

ASSIGNMENT SHEET #1 — COMPLETE A WORKSHEET ON SELECTING TRANSPORTATION

A. Alice works as a parts clerk for Farmer's Implement Company. Jim Haymaker came in on Tuesday to buy a bearing for his baler. Alice discovered that the part was out of stock so she called the regional parts office. The clerk at the parts office told her that the bearing could be shipped out of Chicago, Illinois and asked her how she wanted it sent. Mr. Haymaker will pay the transportation cost.

1. What method of transportation should Alice use if Mr. Haymaker is not in a hurry for the bearing?

2. What method of transportation should Alice use if Mr. Haymaker needs it immediately?

B. Dave is in charge of shipping for Riverdale Grain Elevator and Feed Supply. Dave has 60 tons of concentrate and 400, 50-lb. sacks of dog food to ship to Lakeland which is 300 miles away. The following are the rates for the different forms of transportation Dave can use.

(NOTE: In figuring tonnage on following problems, use measure - 2,000 lbs. = 1 ton.)

BARGE FREIGHT

Cannot ship less than 10 tons

10 - 30 tons	$13.35 per ton
31 - 50 tons	11.35
51 - 60 tons	9.43

Takes 20 days for delivery

ASSIGNMENT SHEET #1

RAILROAD FREIGHT

500 - 2000 lbs.	$ 3.80 per hundred pound
2000 - 10,000 lbs.	2.50 per hundred pound
up to 10 tons	32.50 per ton
20 tons	28.60
30 tons	19.30
45 tons	15.83
50 tons	14.63
60 tons	13.40

Takes 5 days for delivery

TRUCK FREIGHT

500 - 1000 lbs.	5.2¢ per pound
1,000 - 2,000 lbs.	4.1¢
2,000 - 5,000 lbs.	3.5¢
5,000 - 15,000 lbs.	2.7¢
15,000 - 24,000 lbs. - truck load	1.5¢

Takes 1 day for delivery

1. What would the cost be for shipping the concentrate by each form of transportation
   a. Barge ______________________
   b. Railroad ______________________
   c. Truck ______________________
2. Which carrier should Dave choose if the concentrate costs an additional $2.00 per ton each day in route to Lakeland?
3. If Dave shipped 400 sacks of dog food to Lakeland using the same rate, what would his cost be by
   a. Railroad ______________________
   b. Truck ______________________
4. Which carrier should Dave choose to ship the dog food? Why?

TRANSPORTATION AND WAREHOUSING
UNIT I

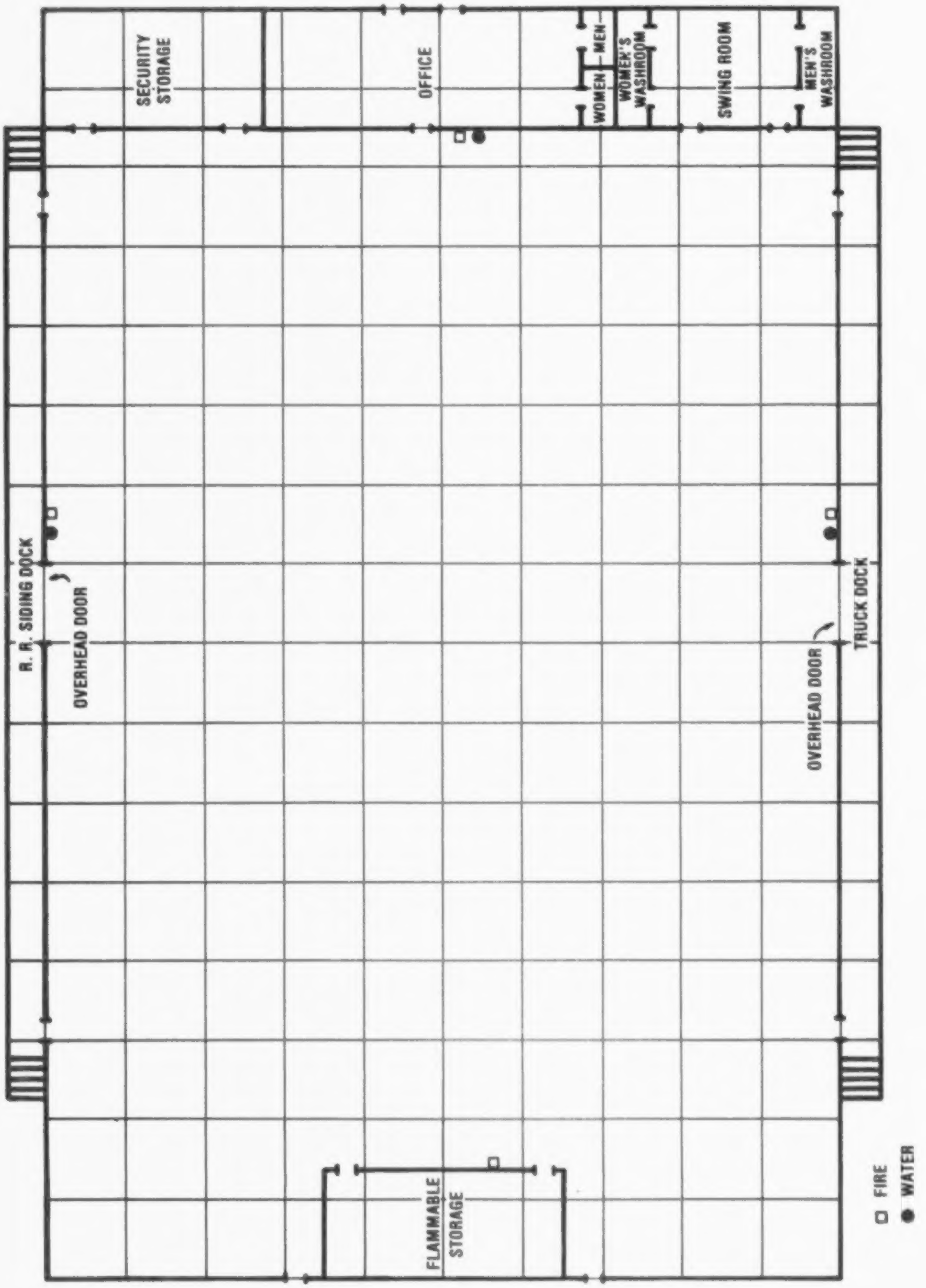
ASSIGNMENT SHEET #2 — SKETCH A FLOOR PLAN FOR A WAREHOUSE

Directions: Using the drawing on the back of this sheet, sketch in the placement of the racks and aisles. The racks are 6 feet wide and 12 feet long and can be placed back to back. The aisles should be 18 feet wide. A total of 3,600 feet of racks is needed.

Scale: One inch equals 48 feet

(NOTE: Each square is 24′ × 24′.)

ASSIGNMENT SHEET #2


SECURITY STORAGE
OFFICE
WOMEN
MEN
WOMEN'S WASHROOM
SWING ROOM
MEN'S WASHROOM
R. R. SIDING DOCK
OVERHEAD DOOR
TRUCK DOCK
OVERHEAD DOOR
FLAMMABLE STORAGE
□ FIRE
● WATER

TRANSPORTATION AND WAREHOUSING
UNIT I

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1

A. 1. Parcel post
   2. Air freight

B. 1. a. $565.80
      b. $804.00
      c. $1800.00

   2. Railroad

   3. a. $325.00
      b. $300.00

   4. Truck. It costs less and will arrive faster

Assignment Sheet #2 — Evaluated to the satisfaction of the instructor

TRANSPORTATION AND WAREHOUSING
UNIT I

NAME ________________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. The practice of receiving, storing, and/or stocking merchandise or commodities

_____b. Shipment that completely fills a freight car and is charged lower rates

_____c. A wall constructed to prevent the spread of fire

_____d. To ship goods in sealed portable containers by rail, road, air, or sea

_____e. To ship goods or commodities already in a trailer on a flat car

_____f. Products of agriculture or mining such as grains or coal

_____g. Shipment that does not fill a freight car and will pay higher rates than a carload lot

_____h. A structure or building used in the storage of merchandise or commodities

_____i. Cash on delivery

_____j. An individual or organization that sends goods by means of a carrier

_____k. An individual or organization engaged in transporting goods for a fee

_____l. Without charge for delivery to and placing on board a carrier at a specified point

1. Containerization
2. Fire wall
3. C.O.D.
4. Warehousing
5. Commodities
6. Carrier
7. F.O.B.
8. Less than carload lots
9. Warehouse
10. Piggyback
11. Carload lots
12. Shipper

TEST

2. Match common types of transportation on the right with their characteristics.

______a. Haul all types of products and commodities; provide four types of service which include common carriers, contact carriers, private carriers, and exempt carriers

______b. Used to transport heavy, bulky commodities and products that have low perishability

______c. Haul all types of products and commodities; can ship in carload lots or less than carload lots; provide containerization and piggyback service to shippers who need it

______d. Provide door-to-door service; charge includes insurance for loss or damage; may provide next day delivery within 150 to 400 miles of pick up point

______e. Provides service for carrying letters and small packages; provides special services at a nominal charge

______f. Carry oil, gas, and chemicals; can carry ore, gravel, and grain in a water slurry

______g. Used to transport items that are light in weight, small in size, and high in value; provides fast service for highly perishable products such as fresh flowers, fresh seafood, and emergency medication

1. Railroads
2. Pipelines
3. Motor carriers
4. Water carriers
5. Airfreight
6. Parcel post
7. Private parcel carriers

3. Complete the following list of factors to consider in selecting transportation.

a. ______________________ and services offered by carrier

b. ______________________ of carrier

c. ______________________ as compared to other types of transportation

d. ______________________ it takes to deliver product

e. Delivery points

TEST

4. Match the common types of transportation on the right with their advantages/disadvantages.

a. Advantages

______1) Reliable; able to haul large quantity of bulky commodities; takes fewer people to haul large loads; lower rates than motor carriers

______2) Quick, safe service; product needs less protective packaging, small quantities may be shipped

______3) Low cost of maintenance, unaffected by weather, traffic, and other environmental problems

______4) Fast; convenient to use; reliable; provide C.O.D. services

______5) Low cost; large quantities of bulky commodities such as grain and coal can be shipped at one time; negotiable rate

______6) Convenient; loads directly from warehouse, can reach even the most remote areas as long as there is a decent road

1. Railroads
2. Motor carriers
3. Water carriers
4. Airfreight
5. Pipelines
6. Parcel post and private parcel carriers

b. Disadvantages

______1) Delays may be caused by switching cars at freight yards; small quantities are more expensive to ship; slow speed of transportation

______2) Slow service; limited to products with low perishability; delay in delivery caused by bad weather conditions

______3) High rates; limited in size and weight of shipment; delay in delivery caused by bad weather conditions

______4) High cost of loading and unloading small shipments; frequently carrier must make return trip partially loaded or empty

TEST

______5) Area limited by high cost of installation; service limited to certain types of products

______6) Limited in size and weight of shipment; packages must be wrapped properly before shipping

5. Complete the following list of statements concerning government agencies that regulate transportation.

    a. ____________________ — Enforces rules and regulations which carriers that cross state lines must follow; sets up fair and reasonable rates and classifications

    b. State Department of Transportation — Enforces laws which carriers that haul ____________________ must follow

    c. Civil Aeronautics Board — Regulates ____________________ transportation

6. List four reasons for warehousing.

    a. ____

    b. ____

    c. ____

    d. ____

7. Select traits of a modern warehouse by placing an "X" in the appropriate blanks.

    ______a. Usually is a two-story building

    ______b. Uses pallets and material-handling equipment

    ______c. Has an indirect flow assembly line for product movement within warehouse

    ______d. Uses effective storage layout plans

    ______e. Usually is a one-story building

8. Complete the following list of factors to consider in planning a floor layout.

    a. Amount of ____________________ and ____________________ space available

    b. Size and weight of items to be ____________________

TEST

c. ____________________ of floor in supporting weight of items

d. ____________________ and size of doors

e. Location of ____________________

f. Location of support beams

g. ____________________ devices and equipment to be used in warehouse operation

9. Match the types of warehouse equipment on the right with their correct definitions.

_____a. Wood or metal portable platform for handling, storing, or moving materials in a safe, efficient manner

_____b. Main division of the warehouse which serves as an open floor storage area

_____c. An enclosed place such as a box or crib which is used for storage

_____d. Metal framework in which large items or loaded pallets are stored

_____e. A thin, flat piece of material fastened horizontally to a wall or within a framework to hold small items

1. Rack
2. Pallet
3. Shelf
4. Bay
5. Bin

10. Match safety color codes with their uses.

_____a.
  1) Applied to nonhazardous parts of machine and equipment surfaces, like nameplates and bearing surfaces
  2) Designates safe areas of equipment, and is also used to show location of safety equipment and first-aid materials

_____b.
  1) Applied to operating levers, wheels, handles, and hazardous parts that may cause stumbling, falling, snagging, or tripping
  2) Designates caution

1. Safety blue
2. Safety red

TEST

______c. 1) Applied to electrical switches, interior surfaces of doors, fuses and electrical power boxes, and movable guards and parts

2) Indicates dangerous parts of equipment which may cut, crush, shock, or otherwise physically injure someone

______d. 1) Applied to buttons or levers of electrical switches used for stopping machinery, and to all equipment, such as gasoline cans, which are fire hazards

2) Designates fire hazards and fire-fighting equipment

______e. 1) Used to identify equipment which is being repaired or is defective and should not be operated

2) Designates "out of order" or "defective"

______f. 1) Applied to label edges, vise jaws, and edges of tool rests where extra light reflection is important

2) No particular designation except to help show tool and equipment moving edges more clearly

______g. 1) Applied to area where radiation is a factor or danger

2) Designates radiation hazards

______h. 1) Applied to floors for safety lanes and location of housekeeping supplies

2) The single or combination use of these colors are used to identify traffic flow and housekeeping zones

3. Safety ivory
4. Safety orange
5. Safety yellow
6. Safety green
7. Safety black, safety white, and safety yellow
8. Safety black on safety yellow

TEST

11. Select true statements concerning proper handling and storage by placing an "X" in the appropriate blanks.

______a. Keep movement and handling of goods to a minimum

______b. Store hazardous materials in an area with other goods

______c. Store goods in a damp, cool place

______d. Mark stock and aisles for accurate and quick identification

______e. Store goods in new containers to increase handling and provide protection

______f. Use FIFO (first-in-first-out) rotation system

______g. Locate fast moving goods in an easy access area

______h. Stack goods so that a maximum of space is used

12. Complete the following list of statements concerning handling and storage of hazardous materials.

a. Store toxic chemicals such as insecticides and pesticides in a ____________________ area and check frequently for leaks

b. Store ____________________ away from combustible materials and water, use rubber gloves when handling, and check frequently for leaks

c. Post ____________________ signs in areas where flammable liquids or materials are stored

d. Combustible materials such as wood and paper should be stored in areas equipped with ____________________ and adequate space should be left between stacks

e. Flammable liquids such as fuel, paint products, and cleaning solvents should be stored in a separate warehouse or separate room divided by ____________________ and equipped with a sprinkler system; good ventilation should be provided

f. Flammable gases such as oxygen and acetylene should be stored in a separate building with good ventilation; tanks should be stored ____________________

g. Ag chemicals should be stored ____________________ feed and seed

h. Metal storage cabinets should be made from a minimum ____________________ gauge sheet iron and have a double wall with 1 1/2 inches air space

TEST

13. Select true statements concerning practices and procedures for storing food by placing an "X" in the appropriate blanks.

_____a. Store dry-pack items and canned goods in a cool, dry, well ventilated area

_____b. Store goods on closed shelving at least eight inches off floor and six inches from wall

_____c. Store food items that need refrigeration in temperatures between 32°F and 50°F

_____d. Store frozen food items in temperatures between 10°F and −20°F

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

14. Complete a worksheet on selecting transportation.

15. Sketch a floor plan for a warehouse.

TRANSPORTATION AND WAREHOUSING
UNIT I

ANSWERS TO TEST

1.	a.	4	g.	8
	b.	11	h.	9
	c.	2	i.	3
	d.	1	j.	12
	e.	10	k.	6
	f.	5	l.	7

2.	a.	3	e.	6
	b.	4	f.	2
	c.	1	g.	5
	d.	7		

3. a. Equipment
   b. Reliability
   c. Cost
   d. Length of time

4.	a.	1)	1	b.	1)	1
		2)	4		2)	3
		3)	5		3)	4
		4)	6		4)	2
		5)	3		5)	5
		6)	2		6)	6

5. a. Interstate Commerce Commission
   b. Within the state
   c. Airline

6. a. To store and protect materials and products against theft, fire, flood, heat and cold, insects and rodents
   b. To prepare and arrange materials and products for shipping
   c. To receive and distribute materials and products
   d. To have a ready supply of products

7. b, d, e

8. a. Horizontal, vertical
   b. Stored
   c. Strength
   d. Location
   e. Loading dock
   g. Storage

ANSWERS TO TEST

9. a. 2
    b. 4
    c. 5
    d. 1
    e. 3

10. a. 6
    b. 5
    c. 4
    d. 2
    e. 1
    f. 3
    g. 8
    h. 7

11. a, d, f, g

12. a. Well ventilated
    b. Acids
    c. NO SMOKING
    d. Automatic sprinklers
    e. Firewalls
    f. Upright
    g. Separate from
    h. 18

13. a, c

14. and 15. Evaluated to the satisfaction of the instructor

ORDERING, RECEIVING, AND DELIVERY
UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete a purchase order, complete a worksheet on receiving merchandise, and fill out a claim form. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to ordering, receiving, and delivery with their correct definitions.
2. List three ways to order merchandise.
3. Complete a list of statements concerning the first rules of receiving.
4. Circle the words which best complete statements concerning steps in receiving.
5. Select true statements concerning factors affecting the receiving operation.
6. Match types of receiving records with their characteristics.
7. Complete a list of reasons for filing claims.
8. Select true statements concerning the procedure for filing a claim.
9. Complete a list of tips for loading and securing merchandise.
10. Select true statements concerning general rules for customer delivery.
11. Complete a purchase order.
12. Complete a worksheet on receiving merchandise.
13. Fill out a claim form.

ORDERING, RECEIVING, AND DELIVERY
UNIT II

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Invite a warehouse manager from an area agribusiness to speak to class about proper ordering, receiving, and customer delivery.

VII. Take students on a field trip to view a warehouse operation with specific interest in the areas of ordering, receiving, and delivery.

VIII. Have students role play customer delivery to demonstrate proper methods for handling various situations they may encounter on the job.

IX. Designate an area of the school shop as the space in a delivery truck and have students load various items as if they were preparing for a delivery route. Provide various sizes and shapes of items and give students a list showing the order in which items will be delivered.

X. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Bill of Lading

    2. TM 2 — Claim Form

    3. TM 3 — Invoice

    4. TM 4 — Packing Slip

INSTRUCTIONAL MATERIALS

   5. TM 5 — Purchase Order
   6. TM 6 — Waybill
   7. TM 7 — First Rules of Receiving

D. Assignment sheets

   1. Assignment Sheet #1 — Complete a Purchase Order
   2. Assignment Sheet #2 — Complete a Worksheet on Receiving Merchandise
   3. Assignment Sheet #3 — Fill Out a Claim Form

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Wolf, Dr. Willard H. *Marketing Agricultural Products.* Columbus, OH: Ohio Agricultural Education Curriculum Materials Service, The Ohio State University, 1976.

B. *Physical Distribution.* Austin, TX: Instructional Materials Center, University of Texas at Austin, 1979.

C. Ertel, Kenneth A. and Lawrence A. Walsh. *Wholesaling and Physical Distribution.* New York: McGraw-Hill Book Co., 1978.

D. *Retail Florist: Maintenance and Delivery.* Carbondale, IL: Department of Agricultural Education and Mechanization, Southern Illinois University.

ORDERING, RECEIVING, AND DELIVERY
UNIT II

INFORMATION SHEET

I. **Terms and definitions**

A. Bill of lading — Document prepared by the carrier listing goods shipped and other details such as quantity and weight (Transparency 1)

B. Claim — A written form which is filed by receiver asking for compensation due to damaged or incorrect orders (Transparency 2)

C. Invoice — An itemized list of goods shipped specifying price and the terms of sale (Transparency 3)

D. Invoice apron — A record of shipment attached to the invoice when goods are received

E. Invoice register — Record of incoming invoices

F. Packing slip — Lists contents of package and gives purchase order number (Transparency 4)

G. Purchase order — Written request for goods which lists item specifications such as type, quantity, price, and date needed (Transparency 5)

(NOTE: The purchase order must be signed by the purchasing agent for a business to be legal.)

H. Purchasing agent — Individual in charge of purchasing for a business

I. Receiving dock — Platform where transportation vehicles are unloaded

J. Unethical — Not conforming to accepted professional standards of conduct

K. Waybill — Document giving details of shipment which is prepared by a carrier when there is more than one carrier involved (Transparency 6)

II. **Ways to order merchandise**

A. By mail

B. By telephone

(NOTE: The telephone is normally used on rush orders to speed the delivery of goods. A confirming purchase order is then sent by mail.)

C. Through a salesperson

INFORMATION SHEET

III. **The first rules of receiving** (Transparency 7)

- A. If purchased by weight, weigh it
- B. If purchased by unit, count it
- C. If purchased by case, open it
- D. Check for compliance with purchase order

IV. **Steps in receiving**

- A. Check invoice to see if the products delivered agree with it
- B. Inspect the merchandise to determine if it is in agreement with the purchase order
- C. Inspect the shipment for evidence of physical damage
- D. Open the cartons and inspect items, matching stock numbers, types of goods, and other information with the original order
- E. Note any discrepancies between the purchase order, invoice, and/or actual merchandise delivered
- F. File an over, short, or damage claim with the carrier if a problem exists
- G. Accept the merchandise by signing the invoice and returning a copy to carrier
- H. Store or deliver goods to proper place
- I. Mark items that will go on selling floor with price tags

V. **Factors affecting the receiving operation**

- A. Adequate room should be provided for delivery trucks to safely back into the receiving area
- B. Receiving dock should be wide enough to permit loading and unloading without crowding the edge of the dock
- C. When a truck is being unloaded, traffic should flow in one direction
    1. Loaded hand trucks should stay to the left
    2. Empty hand trucks should stay to the right

    (NOTE: When loading, the reverse would be true.)

INFORMATION SHEET

D. Warehouse or storeroom should be sectioned by types of merchandise for easy identification and quick access

Example: A feed and supply store warehouse might be sectioned by sacked feed, seed, livestock equipment, veterinary supplies, and building materials

E. Keep customer pick up area separate from the receiving dock

F. Proper security should be provided for protection against loss and theft

(NOTE: Never leave stock unattended on receiving dock. Secure doors when there is no activity.)

G. Proper facilities should be available for receiving hazardous materials

VI. Types of receiving records and their characteristics

A. Receiving log

1. Identifies each shipment received by purchase order number, date delivered, company that delivered, number of pieces in shipment, weight, and types of merchandise delivered

2. Includes initials of employee who received and processed shipment

B. Invoice

1. Official document of the vendor or shipper of the merchandise

2. Usually sent ahead of the shipment and serves as a notice that the shipment is on the way

3. Contains the following information

    a. Purchase order number

    b. Date of invoice

    c. Contents and quantities on the shipment

    d. Number of cartons being shipped

    e. The weight of the shipment

    f. Name of the carrier

    g. Prices on each unit in the shipment

INFORMATION SHEET

- h. Terms and discounts available
- i. Due dates on payments

C. Invoice register

1. Acts as a permanent record of all invoices received
2. Used to check on delayed or misplaced shipments

D. Invoice apron

1. Acts as a substitute for invoice register
2. May be a label or rubber stamp that is affixed to invoice
3. Provides a complete account of the shipment from time it leaves manufacturer until the invoice is paid

E. Bill of lading

1. Designates carrier as being responsible for loss or damage to merchandise enroute
2. Specifies date shipped and date delivered
3. Provides location of delivery
4. Different types of bill of ladings
   - a. Straight bill — Used when vendor is shipping straight to customer
   - b. Order bill — Like straight bill except it can be transferred to another customer
   - c. Waybill — Used when more than one carrier is used

VII. Reasons for filing claims

(NOTE: It is unethical to return merchandise simply because it did not sell or was damaged after it was received.)

A. Claims should be filed with the carrier if

1. There is visible damage to the cartons and/or merchandise upon receipt
2. Cartons or merchandise are missing from shipment upon receipt

INFORMATION SHEET

B. Claims should be filed against vendor if

  1. Contents of cartons are short
  2. Contents of cartons are damaged
  3. Contents are not exactly as specified on purchase order
  4. Substitutions or items of inferior quality were sent
  5. Transportation of merchandise was not as specified

     Example: Merchandise sent airfreight instead of parcel post

VIII. **Procedure for filing a claim**

  A. Make a note on the invoice, bill of lading, and receiving log that a claim will be filed

  B. Fill out a claim using form required by the specific carrier or vendor

  C. File claim within time limit as specified by state laws

IX. **Tips for loading and securing merchandise**

  A. Load deliveries so that first deliveries are near the door

  B. Plan ahead for any railroad crossings or rough roads and secure merchandise accordingly

  C. Protect fragile and glass objects from breakage by adding additional wrapping

  D. Use racks to secure boxes and keep them from falling

  E. Use sand bags to support items that may roll around

X. **General rules for customer delivery**

  A. Use a routing sheet to record facts about deliveries

  B. Leave a notice of an attempted delivery and designate whether the order should be picked up at store, if it has been left with neighbor, or when you will return with order

INFORMATION SHEET

C. Be friendly and courteous at all times

(NOTE: When you are out on a delivery, you are an extension of the business. Make a good impression on the customers.)

D. Wear proper attire for the job

(NOTE: If no uniform is required, check with your immediate supervisor as to proper attire.)

E. Be clean and neat in appearance

F. Obey all traffic laws

G. Lock delivery truck when left unattended

H. Never drive through yards, fields, crops, or any place that might damage a person's property

I. Do not enter customer's buildings or home without permission

J. Shut gates that are opened as a result of delivery

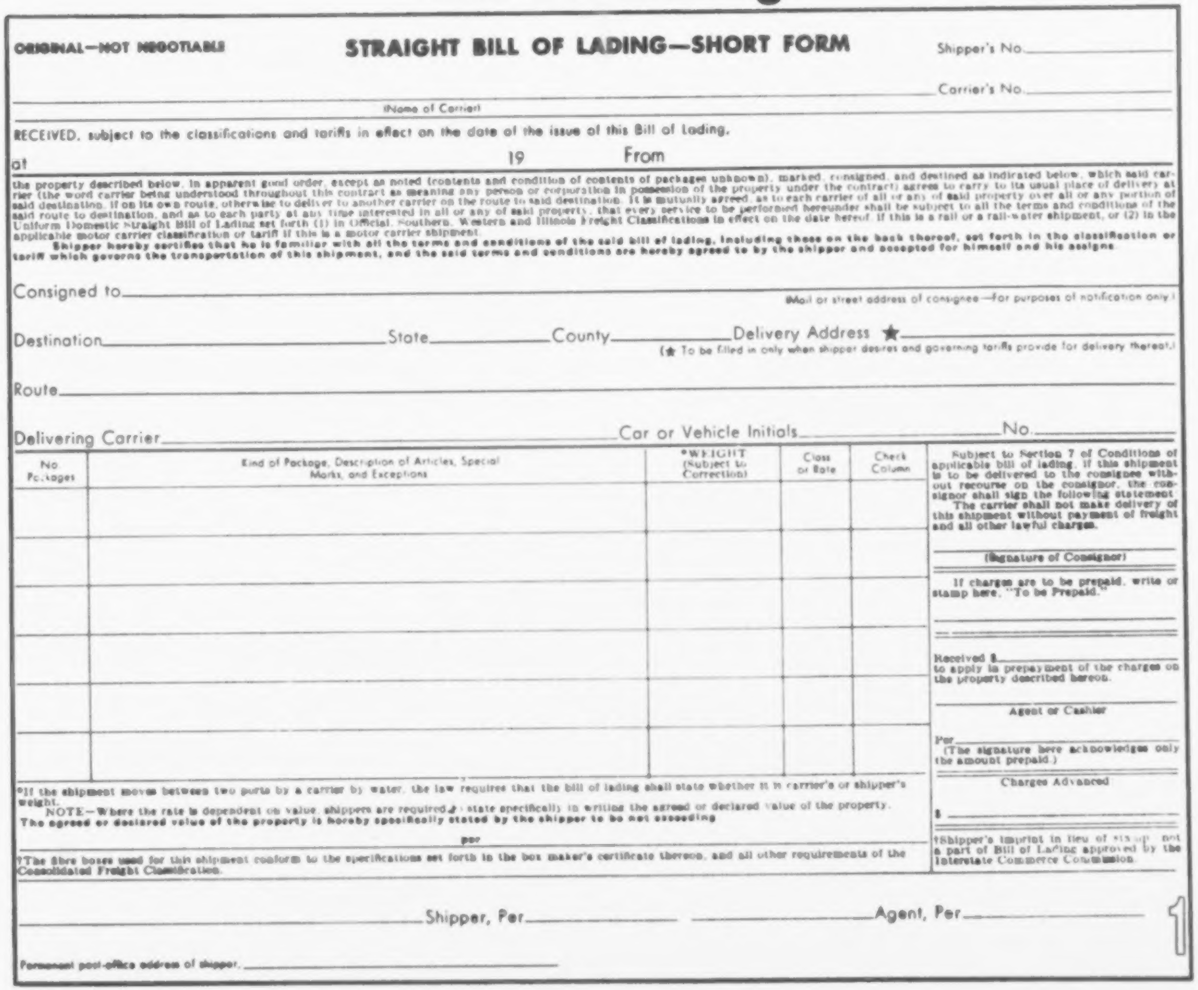
K. Replace lids on feeders as necessary

L. Leave a copy of bill with customer

M. Report damage that occurs to a customer's property or merchandise as a result of a delivery to the supervisor as soon as possible

N. Know what to do in the event of an accident and notify your supervisor as soon as possible

Bill of Lading



ORIGINAL—NOT NEGOTIABLE **STRAIGHT BILL OF LADING—SHORT FORM** Shipper's No.________

________________ Carrier's No.________

(Name of Carrier)

RECEIVED, subject to the classifications and tariffs in effect on the date of the issue of this Bill of Lading.

at 19 From

the property described below, in apparent good order, except as noted (contents and condition of contents of packages unknown), marked, consigned, and destined as indicated below, which said carrier (the word carrier being understood throughout this contract as meaning any person or corporation in possession of the property under the contract) agrees to carry to its usual place of delivery at said destination, if on its own route, otherwise to deliver to another carrier on the route to said destination. It is mutually agreed, as to each carrier of all or any of said property over all or any portion of said route to destination, and as to each party at any time interested in all or any of said property, that every service to be performed hereunder shall be subject to all the terms and conditions of the Uniform Domestic Straight Bill of Lading set forth (1) in Official, Southern, Western and Illinois Freight Classifications in effect on the date hereof, if this is a rail or a rail-water shipment, or (2) in the applicable motor carrier classification or tariff if this is a motor carrier shipment.

Shipper hereby certifies that he is familiar with all the terms and conditions of the said bill of lading, including those on the back thereof, set forth in the classification or tariff which governs the transportation of this shipment, and the said terms and conditions are hereby agreed to by the shipper and accepted for himself and his assigns.

Consigned to________________

(Mail or street address of consignee—For purposes of notification only.)

Destination________ State______ County______ Delivery Address ★________

(★ To be filled in only when shipper desires and governing tariffs provide for delivery thereat.)

Route________________

Delivering Carrier________ Car or Vehicle Initials________ No.______

No. Packages	Kind of Package, Description of Articles, Special Marks, and Exceptions	*WEIGHT (Subject to Correction)	Class or Rate	Check Column

Subject to Section 7 of Conditions of applicable bill of lading, if this shipment is to be delivered to the consignee without recourse on the consignor, the consignor shall sign the following statement:

The carrier shall not make delivery of this shipment without payment of freight and all other lawful charges.

____

(Signature of Consignor)

If charges are to be prepaid, write or stamp here, "To be Prepaid."

Received $________ to apply in prepayment of the charges on the property described hereon.

____

Agent or Cashier

Per________

(The signature here acknowledges only the amount prepaid.)

Charges Advanced

$ ________

†Shipper's imprint in lieu of stamp; not a part of Bill of Lading approved by the Interstate Commerce Commission.

*If the shipment moves between two ports by a carrier by water, the law requires that the bill of lading shall state whether it is carrier's or shipper's weight.

NOTE—Where the rate is dependent on value, shippers are required to state specifically in writing the agreed or declared value of the property.

The agreed or declared value of the property is hereby specifically stated by the shipper to be not exceeding

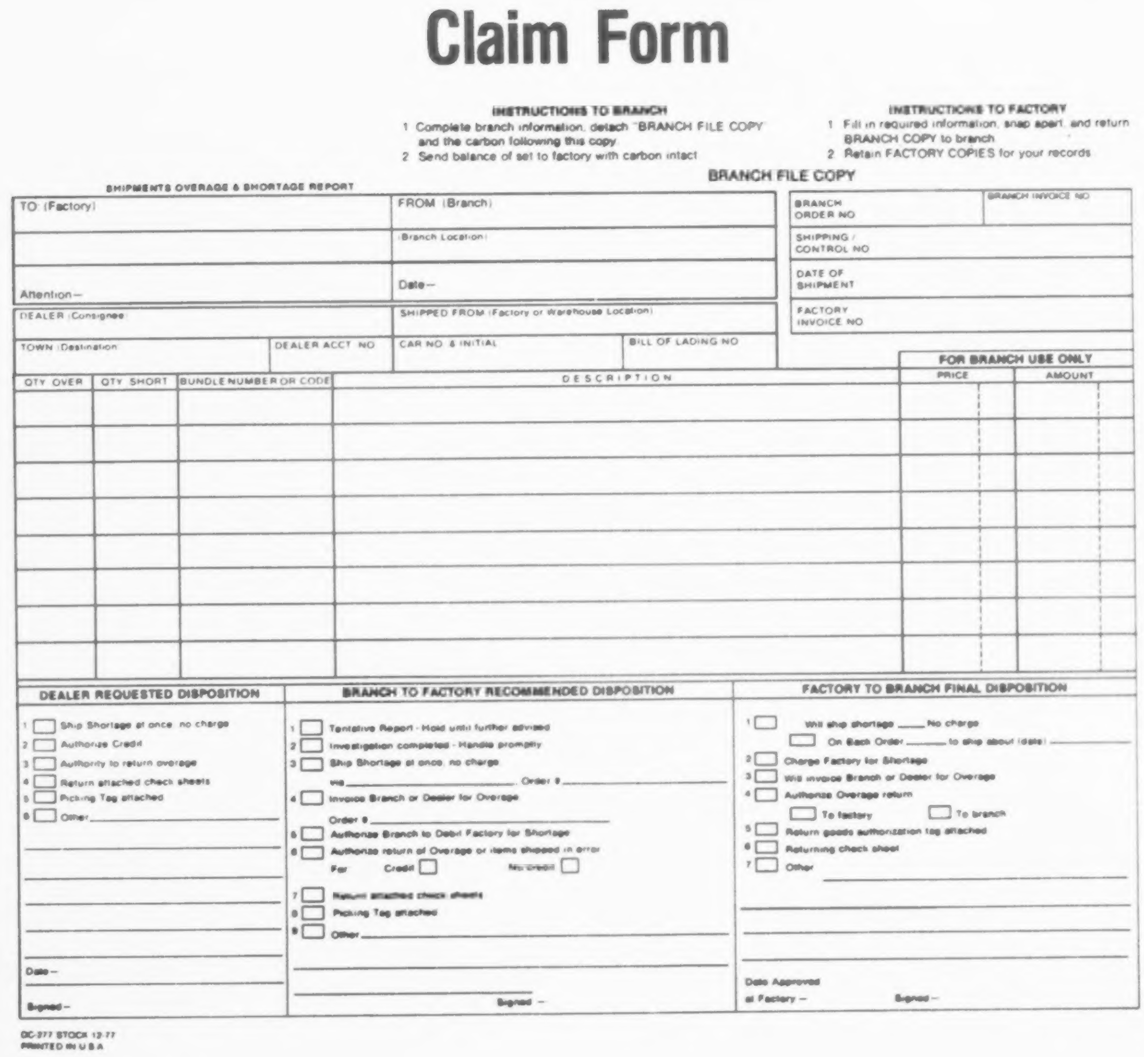
per

†The fibre boxes used for this shipment conform to the specifications set forth in the box maker's certificate thereon, and all other requirements of the Consolidated Freight Classification.

________________ Shipper, Per________ ________________ Agent, Per________

1

Permanent post-office address of shipper.________________



Claim Form

INSTRUCTIONS TO BRANCH

1 Complete branch information, detach "BRANCH FILE COPY" and the carbon following this copy.
2 Send balance of set to factory with carbon intact

INSTRUCTIONS TO FACTORY

1 Fill in required information, snap apart, and return BRANCH COPY to branch
2 Retain FACTORY COPIES for your records

BRANCH FILE COPY

SHIPMENTS OVERAGE & SHORTAGE REPORT

TO: (Factory)
Attention —
FROM (Branch)
(Branch Location)
Date —
DEALER (Consignee)
SHIPPED FROM (Factory or Warehouse Location)
TOWN (Destination)
DEALER ACCT NO
CAR NO & INITIAL
BILL OF LADING NO

BRANCH ORDER NO
BRANCH INVOICE NO
SHIPPING / CONTROL NO
DATE OF SHIPMENT
FACTORY INVOICE NO

				FOR BRANCH USE ONLY	
QTY OVER	QTY SHORT	BUNDLE NUMBER OR CODE	DESCRIPTION	PRICE	AMOUNT

DEALER REQUESTED DISPOSITION

1 ☐ Ship Shortage at once, no charge
2 ☐ Authorize Credit
3 ☐ Authority to return overage
4 ☐ Return attached check sheets
5 ☐ Picking Tag attached
6 ☐ Other ____________

Date —
Signed —

BRANCH TO FACTORY RECOMMENDED DISPOSITION

1 ☐ Tentative Report - Hold until further advised
2 ☐ Investigation completed - Handle promptly
3 ☐ Ship Shortage at once, no charge
via ____________ Order # ____________
4 ☐ Invoice Branch or Dealer for Overage
Order # ____________
5 ☐ Authorize Branch to Debit Factory for Shortage
6 ☐ Authorize return of Overage or items shipped in error
For Credit ☐ No credit ☐
7 ☐ Return attached check sheets
8 ☐ Picking Tag attached
9 ☐ Other ____________

Signed —

FACTORY TO BRANCH FINAL DISPOSITION

1 ☐ Will ship shortage _____ No charge
☐ On Back Order _____ to ship about (date) ____________
2 ☐ Charge Factory for Shortage
3 ☐ Will invoice Branch or Dealer for Overage
4 ☐ Authorize Overage return
☐ To factory ☐ To branch
5 ☐ Return goods authorization tag attached
6 ☐ Returning check sheet
7 ☐ Other ____________

Date Approved
at Factory — Signed —

OC-277 STOCK 12-77
PRINTED IN U.S.A.

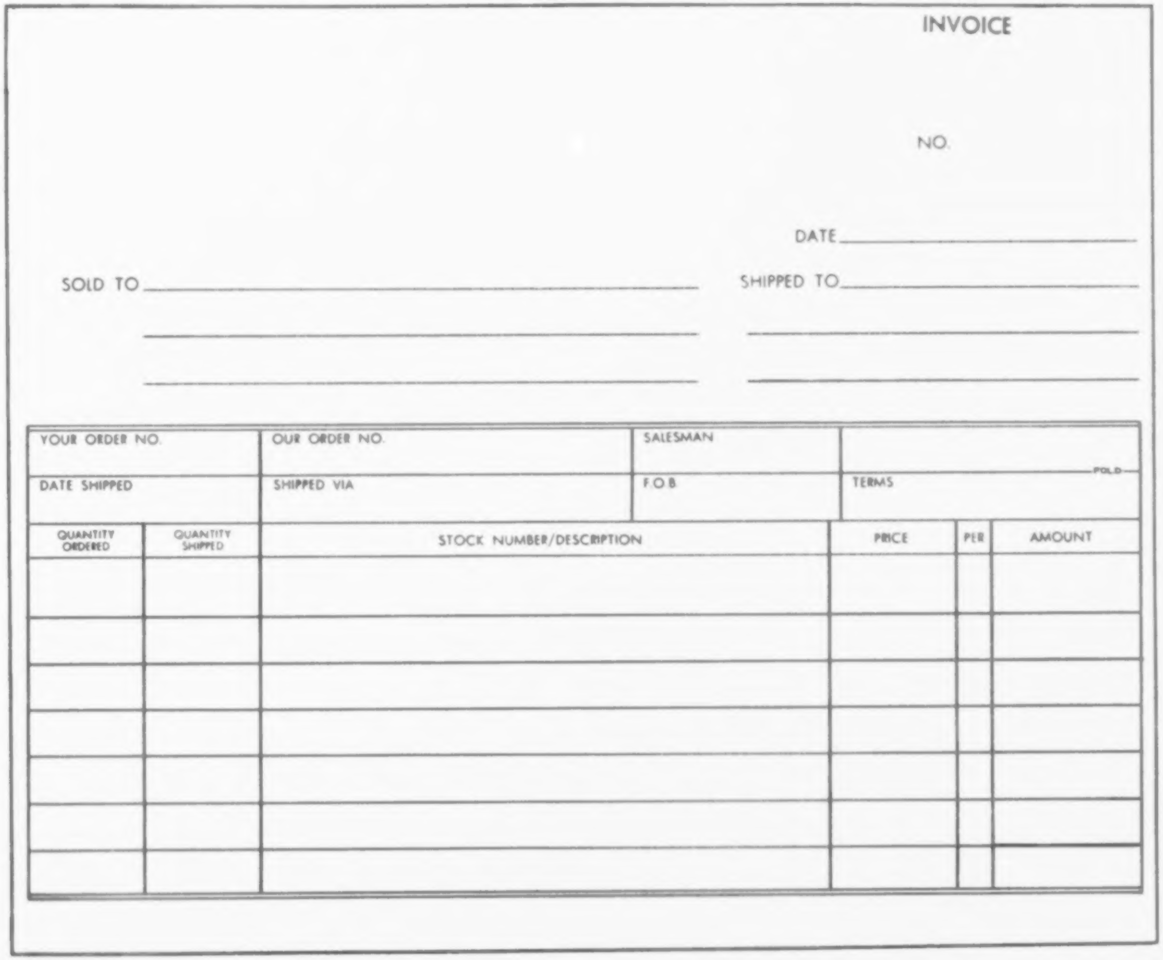
TM 2

470

471

EA - 47-D

Invoice



INVOICE

NO.

DATE

SOLD TO

SHIPPED TO

YOUR ORDER NO.	OUR ORDER NO.	SALESMAN	FOLD
DATE SHIPPED	SHIPPED VIA	F.O.B.	TERMS

QUANTITY ORDERED	QUANTITY SHIPPED	STOCK NUMBER/DESCRIPTION	PRICE	PER	AMOUNT

Packing Slip

PACKING SLIP

Shipped From:

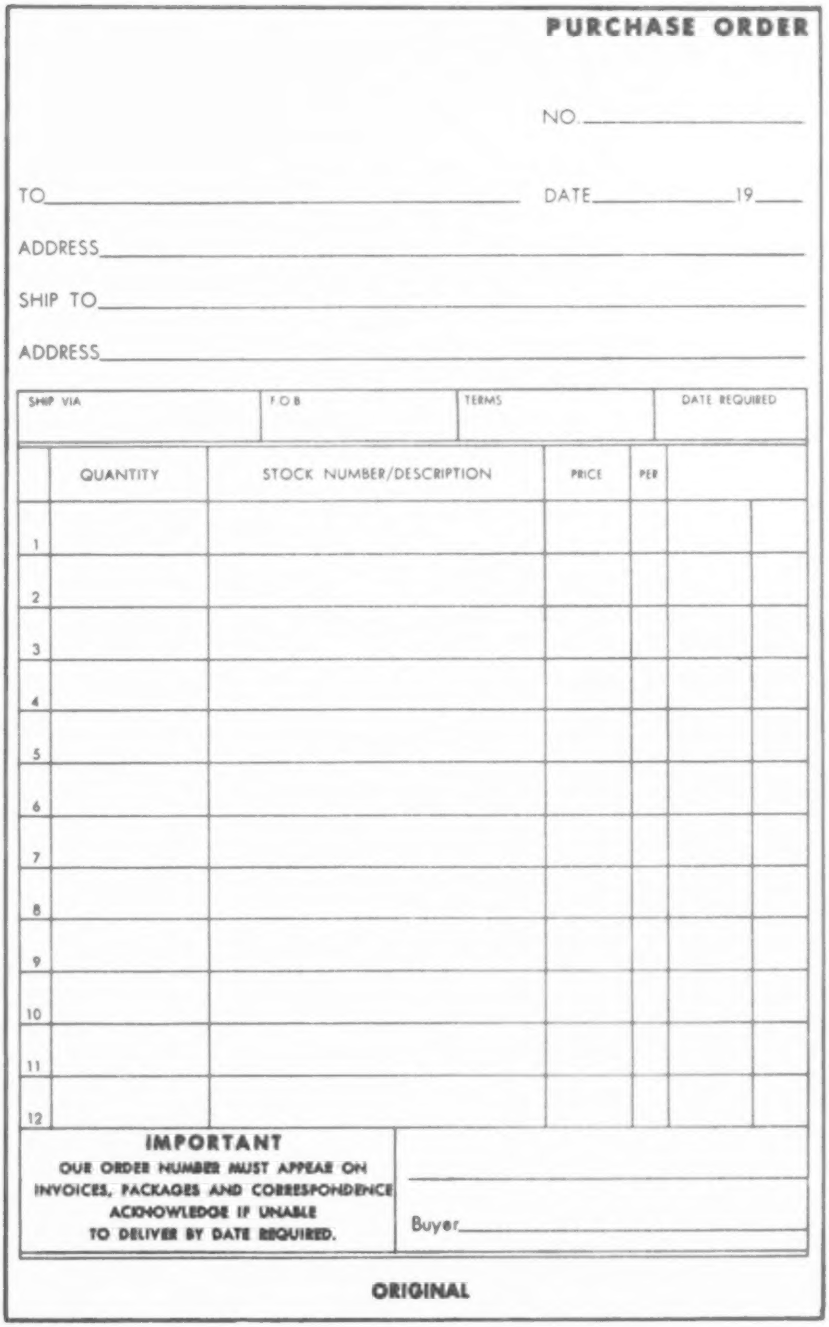
Ship To:

Customer's Order Number	Date Shipped	Route Via

QUANTITY ORDERED	DESCRIPTION	QUANTITY SHIPPED	QUANTITY BACK—ORDERED

EA - 53-D

Purchase Order



PURCHASE ORDER

NO.______________

TO____________________________ DATE__________19____

ADDRESS________________________________

SHIP TO________________________________

ADDRESS________________________________

SHIP VIA	F.O.B.	TERMS	DATE REQUIRED

	QUANTITY	STOCK NUMBER/DESCRIPTION	PRICE	PER		
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

IMPORTANT

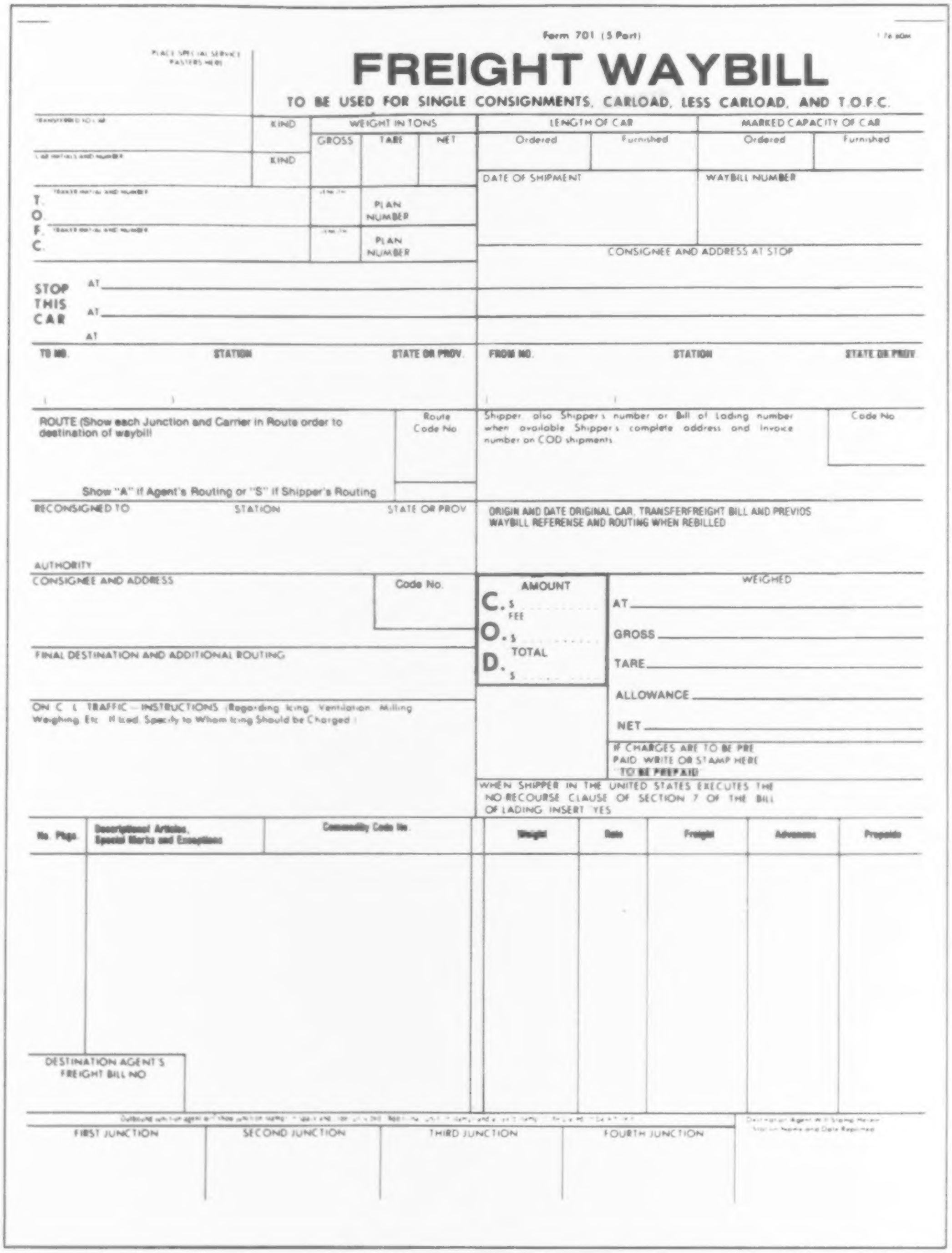
OUR ORDER NUMBER MUST APPEAR ON INVOICES, PACKAGES AND CORRESPONDENCE ACKNOWLEDGE IF UNABLE TO DELIVER BY DATE REQUIRED.

____

Buyer________________________

ORIGINAL

Waybill



Form 701 (5 Part)

PLACE SPECIAL SERVICE PASTERS HERE

FREIGHT WAYBILL

TO BE USED FOR SINGLE CONSIGNMENTS, CARLOAD, LESS CARLOAD, AND T.O.F.C.

TRANSFERRED TO CAR	KIND	WEIGHT IN TONS			LENGTH OF CAR		MARKED CAPACITY OF CAR	
CAR INITIALS AND NUMBER	KIND	GROSS	TARE	NET	Ordered	Furnished	Ordered	Furnished

DATE OF SHIPMENT

WAYBILL NUMBER

T.O.F.C.
TRAILER INITIAL AND NUMBER — LENGTH — PLAN NUMBER
TRAILER INITIAL AND NUMBER — LENGTH — PLAN NUMBER

CONSIGNEE AND ADDRESS AT STOP

STOP THIS CAR
AT ____________
AT ____________
AT

TO NO.	STATION	STATE OR PROV.	FROM NO.	STATION	STATE OR PROV.

ROUTE (Show each Junction and Carrier in Route order to destination of waybill

Route Code No

Show "A" if Agent's Routing or "S" if Shipper's Routing

Shipper, also Shipper's number or Bill of Lading number when available Shipper's complete address and invoice number on COD shipments

Code No

RECONSIGNED TO — STATION — STATE OR PROV

AUTHORITY

ORIGIN AND DATE ORIGINAL CAR, TRANSFERFREIGHT BILL AND PREVIOS WAYBILL REFERENSE AND ROUTING WHEN REBILLED

CONSIGNEE AND ADDRESS

Code No.

FINAL DESTINATION AND ADDITIONAL ROUTING

ON C. L. TRAFFIC — INSTRUCTIONS (Regarding Icing, Ventilation, Milling, Weighing, Etc. If Iced, Specify to Whom Icing Should be Charged.)

C.O.D.
AMOUNT
$ ....
FEE
$ ....
TOTAL
$ ....

WEIGHED
AT ____________
GROSS ____________
TARE ____________
ALLOWANCE ____________
NET ____________

IF CHARGES ARE TO BE PRE PAID, WRITE OR STAMP HERE "TO BE PREPAID"

WHEN SHIPPER IN THE UNITED STATES EXECUTES THE NO RECOURSE CLAUSE OF SECTION 7 OF THE BILL OF LADING INSERT "YES"

No. Pkgs.	Descriptions of Articles, Special Marks and Exceptions	Commodity Code No.	Weight	Rate	Freight	Advances	Prepaids

DESTINATION AGENT'S FREIGHT BILL NO

FIRST JUNCTION	SECOND JUNCTION	THIRD JUNCTION	FOURTH JUNCTION	Destination Agent Will Stamp Here Station Name and Date Received

First Rules of Receiving

If Purchased by Weight

— WEIGH IT

If Purchased by Unit

— COUNT IT

If Purchased by Case

— OPEN IT

IN OTHER WORDS

CHECK IT!

TM 7

EA - 57-D

ORDERING, RECEIVING, AND DELIVERY
UNIT II

ASSIGNMENT SHEET #1 — COMPLETE A PURCHASE ORDER

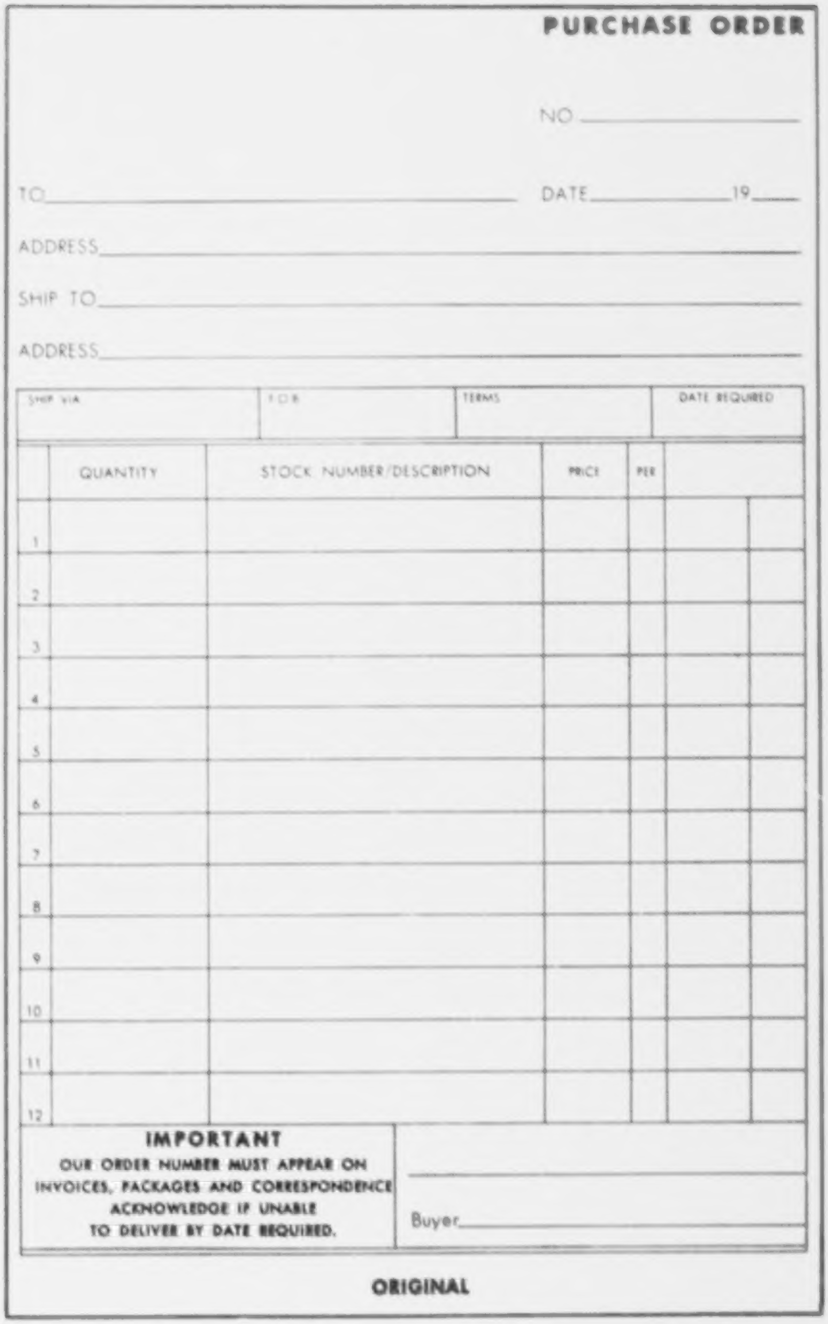
Directions: When preparing a purchase order, it is important to complete the form accurately. Using the information provided below, complete the purchase order on the following page.

The Farmers' Feed and Grain, YourTown, YourState, is buying supplies from Uptown Drug Supply Company, Box 101, OtherTown, OtherState. Supplies needed by February 15, 1984 include two (2) 50# bags of Terramycin at 25¢ per pound, one (1) case of 24 mastitis tubes at 85¢ each, and ten (10) one quart bottles of hog wormer at $1.00 each.

The freight is prepaid and the supplies will be shipped by commercial truck. The payment is to be made by the 15th of the following month. You are the manager and this purchase order number is 412.

(NOTE: Write legibly to prevent errors from being made when order is being processed.)

ASSIGNMENT SHEET #1



PURCHASE ORDER

NO ____________

TO ____________ DATE ________ 19 ____

ADDRESS ____________

SHIP TO ____________

ADDRESS ____________

SHIP VIA	F.O.B.	TERMS	DATE REQUIRED

	QUANTITY	STOCK NUMBER/DESCRIPTION	PRICE	PER		
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

IMPORTANT

OUR ORDER NUMBER MUST APPEAR ON INVOICES, PACKAGES AND CORRESPONDENCE ACKNOWLEDGE IF UNABLE TO DELIVER BY DATE REQUIRED.

____

Buyer ____________

ORIGINAL

ORDERING, RECEIVING, AND DELIVERY
UNIT II

ASSIGNMENT SHEET #2 — COMPLETE A WORKSHEET ON RECEIVING MERCHANDISE

Directions: When supplies are received, it is important to check the shipment against the original order and invoice. Using the invoice provided below and the completed purchase order from Assignment Sheet #1, fill in the receiving record.

(NOTE: Refer to steps in receiving listed in Objective IV of this unit.)

Shipment was received from Uptown Drug Supply Company on February 8. The condition of the four boxes was good; however, upon checking in the supplies you discovered that only five bottles of one quart hog wormer were received.

Invoice

NO. 0001

DATE 2-05-84

SOLD TO Farmer's Feed and Grain
Yourtown, Your State

SHIPPED TO Farmer's Feed and Grain
Yourtown, Your State

YOUR ORDER NO. 412
OUR ORDER NO. 115
SALESMAN Tom
DATE SHIPPED 2-05-84
SHIPPED VIA Truck
F.O.B.
TERMS Payment by the 15th

FOLD

QUANTITY ORDERED	QUANTITY SHIPPED	STOCK NUMBER/DESCRIPTION	PRICE	PER	AMOUNT
100#	100#	2 50# Bags Terramycin	25¢	lb.	$25.00
24	24	1 case – 24ct. Mastitis Tubes	85¢	Ea.	$20.40
10	10	10 bottles of Hog Wormer	$1.00	QT.	$10.00
					$55.40

ASSIGNMENT SHEET #2

RECEIVING RECORD

64731

RECEIVED FROM________________ DATE________________

ADDRESS________________ OUR ORDER NO.________________

VIA________________ RETURNED GOODS ☐

FREIGHT BILL NO.________ EXPRESS ☐ PARCEL POST ☐ PREPAID ☐ COLLECT CHARGES PAID $________

	QUANTITY	STOCK NO.	DESCRIPTION
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			

NUMBER OF PACKAGES	WEIGHT	CONDITION	DELIVERED TO

REMARKS________________

CHECKED WITH PURCHASE ORDER BY

CREDIT MEMO ISSUED BY

RECEIVED BY________________

ORIGINAL

ORDERING, RECEIVING, AND DELIVERY
UNIT II

ASSIGNMENT SHEET #3 — FILL OUT A CLAIM FORM

Claims are filed against either the vendor or carrier if a shipment is over, short, or damaged. Refer to objectives VII and VIII in this unit to review reasons and the procedure for filing a claim.

Directions: Using the purchase order and receiving record provided in Assignment Sheets #1 and #2, complete the claim form on the following page.

INSTRUCTIONS TO BRANCH

1 Complete branch information, detach "BRANCH FILE COPY" and the carbon following this copy

2 Send balance of set to factory with carbon intact

INSTRUCTIONS TO FACTORY

1 Fill in required information, snap apart, and return BRANCH COPY to branch

2 Retain FACTORY COPIES for your records

BRANCH FILE COPY

SHIPMENTS OVERAGE & SHORTAGE REPORT

TO (Factory)	FROM (Branch)
	(Branch Location)
Attention—	Date—
DEALER (Consignee)	SHIPPED FROM (Factory or Warehouse Location)

TOWN (Destination)	DEALER ACCT NO	CAR NO & INITIAL	BILL OF LADING NO

BRANCH ORDER NO	BRANCH INVOICE NO
SHIPPING CONTROL NO	
DATE OF SHIPMENT	
FACTORY INVOICE NO	

				FOR BRANCH USE ONLY	
QTY OVER	QTY SHORT	BUNDLE NUMBER OR CODE	DESCRIPTION	PRICE	AMOUNT

DEALER REQUESTED DISPOSITION

1 ☐ Ship Shortage at once, no charge
2 ☐ Authorize Credit
3 ☐ Authority to return overage
4 ☐ Return attached check sheets
5 ☐ Picking Tag attached
6 ☐ Other ____________

Date —

Signed —

BRANCH TO FACTORY RECOMMENDED DISPOSITION

1 ☐ Tentative Report - Hold until further advised
2 ☐ Investigation completed - Handle promptly
3 ☐ Ship Shortage at once, no charge
via ____________ Order # ____________
4 ☐ Invoice Branch or Dealer for Overage
Order # ____________
5 ☐ Authorize Branch to Debit Factory for Shortage
6 ☐ Authorize return of Overage or items shipped in error
For Credit ☐ No credit ☐
7 ☐ Return attached check sheets
8 ☐ Picking Tag attached
9 ☐ Other ____________

Signed —

FACTORY TO BRANCH FINAL DISPOSITION

1 ☐ Will ship shortage ____ No charge
☐ On Back Order ____ to ship about (date) ____________
2 ☐ Charge Factory for Shortage
3 ☐ Will invoice Branch or Dealer for Overage
4 ☐ Authorize Overage return
☐ To factory ☐ To branch
5 ☐ Return goods authorization tag attached
6 ☐ Returning check sheet
7 ☐ Other ____________

Date Approved at Factory — Signed —

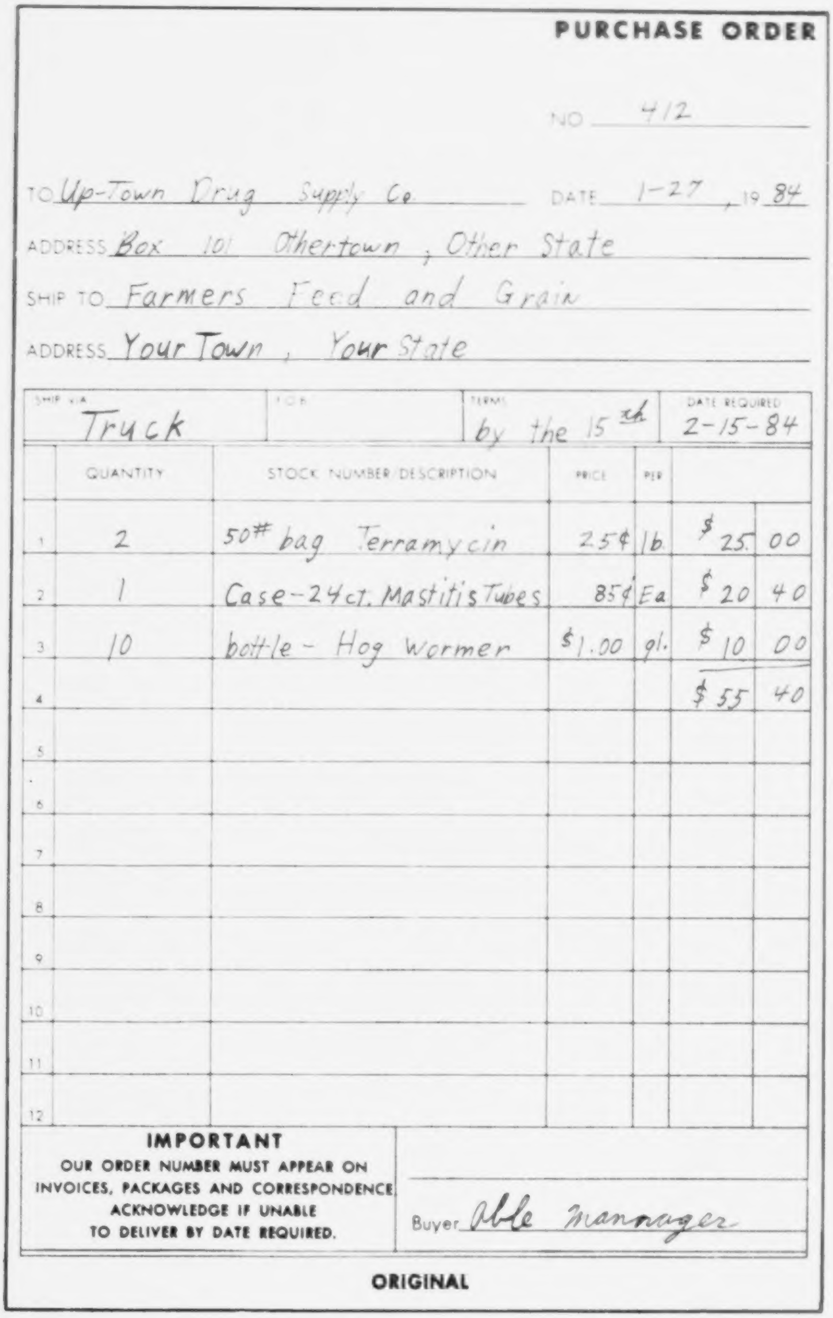
DC-277 STOCK 12-77
PRINTED IN U.S.A.

BEST COPY AVAILABLE

ORDERING, RECEIVING, AND DELIVERY
UNIT II

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1



PURCHASE ORDER

NO 412

TO Up-Town Drug Supply Co. DATE 1-27, 19 84

ADDRESS Box 101 Othertown, Other State

SHIP TO Farmers Feed and Grain

ADDRESS Your Town, Your State

SHIP VIA	F.O.B.	TERMS	DATE REQUIRED
Truck		by the 15th	2-15-84

	QUANTITY	STOCK NUMBER/DESCRIPTION	PRICE	PER		
1	2	50# bag Terramycin	25¢	lb.	$25	00
2	1	Case-24ct. Mastitis Tubes	85¢	Ea	$20	40
3	10	bottle - Hog Wormer	$1.00	gl.	$10	00
4					$55	40
5						
6						
7						
8						
9						
10						
11						
12						

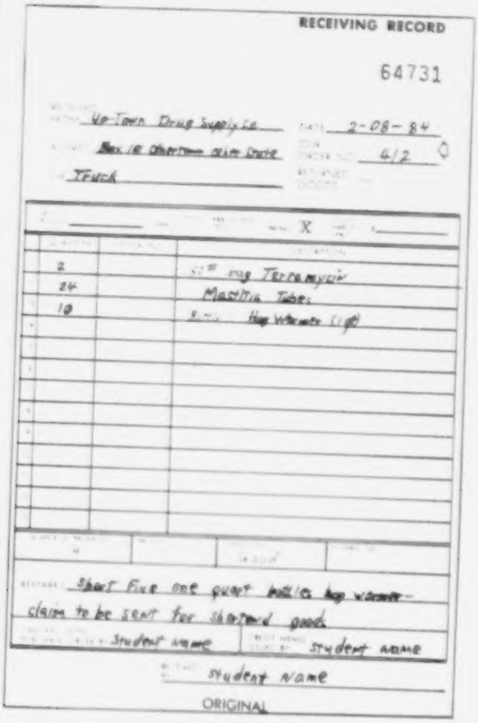
IMPORTANT
OUR ORDER NUMBER MUST APPEAR ON INVOICES, PACKAGES AND CORRESPONDENCE. ACKNOWLEDGE IF UNABLE TO DELIVER BY DATE REQUIRED.

Buyer Able Mannager

ORIGINAL

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #2



RECEIVING RECORD

64731

Up-Town Drug Supply Co
Box 101 Othertown Other State
Truck

2-08-84
412

X

2		12# bag Terramycin
24		Mastitis Tubes
10		Hog Wormer (1 qt)

Good

Short Five one quart bottles hog wormer — claim to be sent for shortaged goods.

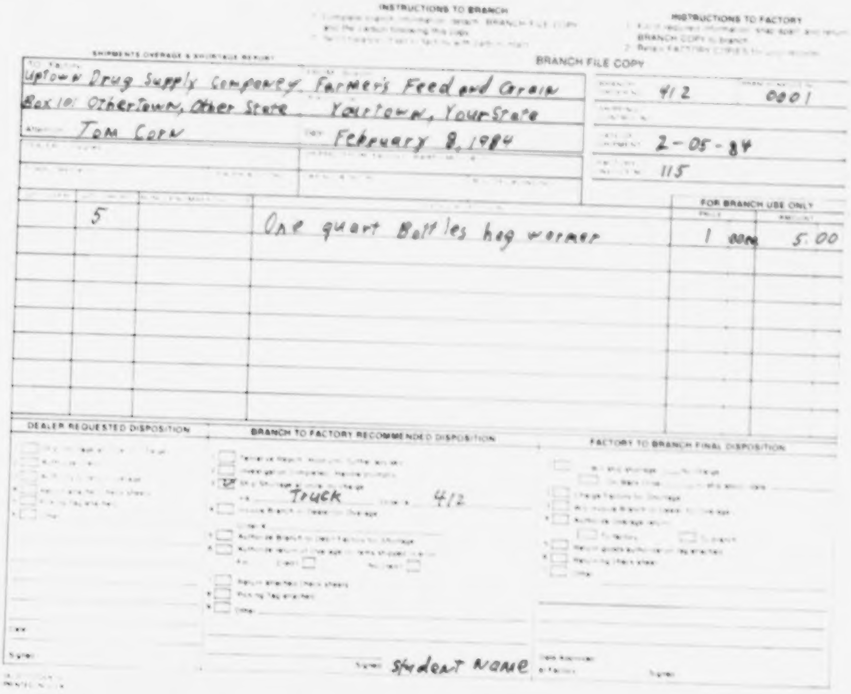
Student name

Student name

Student name

ORIGINAL

Assignment Sheet #3



INSTRUCTIONS TO BRANCH

INSTRUCTIONS TO FACTORY

SHIPMENTS OVERAGE & SHORTAGE REPORT

BRANCH FILE COPY

Uptown Drug Supply Company
Box 101 Othertown, Other State
Tom Corn

Farmer's Feed and Grain
Yourtown, Your State
February 8, 1984

412
0001
2-05-84
115

				FOR BRANCH USE ONLY	
	5		One quart Bottles hog wormer	1 00ea	5.00

DEALER REQUESTED DISPOSITION

BRANCH TO FACTORY RECOMMENDED DISPOSITION

☑ Truck 412

Student name

FACTORY TO BRANCH FINAL DISPOSITION

BEST COPY AVAILABLE

ORDERING, RECEIVING, AND DELIVERY
UNIT II

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

______a. Platform where transportation vehicles are unloaded

______b. Record of incoming invoices

______c. Lists contents of package and gives purchase order number

______d. Document prepared by the carrier listing goods shipped and other details such as quantity and weight

______e. Document giving details of shipment which is prepared by a carrier when there is more than one carrier involved

______f. Individual in charge of purchasing for a business

______g. A record of shipment attached to the invoice when goods are received

______h. Not conforming to accepted professional standards of conduct

______i. A written form which is filed by receiver asking for compensation due to damaged or incorrect orders

______j. Written request for goods which lists item specifications such as type, quantity, price, and date needed

______k. An itemized list of goods shipped specifying price and the terms of sale

1. Invoice apron
2. Bill of lading
3. Claim
4. Invoice
5. Waybill
6. Invoice register
7. Receiving dock
8. Purchase order
9. Unethical
10. Packing slip
11. Purchasing agent

TEST

2. List three ways to order merchandise.

   a. ______________________________

   b. ______________________________

   c. ______________________________

3. Complete the following list of statements concerning the first rules of receiving.

   a. If purchased by weight, ____________________ it

   b. If purchased by ____________________, count it

   c. If purchased by case, ____________________ it

   d. Check for compliance with ____________________

4. Circle the words which best complete the following statements concerning steps in receiving.

   a. Check **(invoice, waybill)** to see if the products delivered agree with it

   b. Inspect the merchandise to determine if it is in agreement with the **(bill of lading, purchase order)**

   c. Note any discrepancies between the **(waybill, purchase order)**, invoice, and/or actual merchandise delivered

   d. File an over, short, or damage claim with the **(vendor, carrier)** if a problem exists

   e. Accept the merchandise by signing the **(packing slip, invoice)** and returning a copy to carrier

   f. Mark items that will go on selling floor with **(identification, price)** tags

5. Select true statements concerning factors affecting the receiving operation by placing an "X" in the appropriate blanks.

   _____a. Adequate room should be provided for delivery trucks to safely back into the receiving area

   _____b. Receiving dock should be wide enough to permit loading and unloading without crowding the edge of the dock

   _____c. When a truck is being unloaded, traffic should flow in two directions

   _____d. Warehouse or storeroom should be sectioned by price of merchandise for easy identification and quick access

TEST

______e. Keep customer pick up area together with the receiving dock

______f. Proper security should be provided for protection against loss and theft

______g. Proper facilities should be available for receiving hazardous materials

6. Match the types of receiving records on the right with their characteristics.

______a. Official document of the vendor or shipper of the merchandise; usually sent ahead of the shipment and serves as a notice that the shipment is on the way; contains purchase order number, contents and quantities on the shipment, terms and discounts available, and due dates on payments

______b. Identifies each shipment received by purchase order number, date delivered, company that delivered, number of pieces in shipment, weight, and types of merchandise delivered; includes initials of employee who received and processed shipment

______c. Designates carrier as being responsible for loss or damage to merchandise enroute; specifies date shipped and date delivered; provides location of delivery

______d. Acts as permanent record of all invoices received; used to check on delayed or misplaced shipments

______e. Acts as a substitute for invoice register; may be a label or rubber stamp that is affixed to invoice; provides a complete account of the shipment from time it leaves manufacturer until the invoice is paid

1. Receiving log
2. Invoice apron
3. Invoice
4. Invoice register
5. Bill of lading

7. Complete the following list of reasons for filing claims.

a. Claims should be filed with the carrier if

1) There is ______________________ to the cartons and/or merchandise

2) ______________________ or ______________________ are missing from the shipment

3) ______________________ are broken

TEST

b. Claims should be filed against vendor if

   1) Contents of cartons are ______________________

   2) Contents are not exactly as specified on ______________________

   3) ______________________ or items of inferior quality were sent

   4) ______________________ of merchandise was not as specified

8. Select true statements concerning the procedure for filing a claim by placing an "X" in the appropriate blanks.

   ______a. Make a note on the invoice, bill of lading, and receiving log that a claim will be filed

   ______b. Fill out a claim form using form required by the specific carrier or vendor

   ______c. File claim within time limit as specified by carrier or vendor

9. Complete the following list of tips for loading and securing merchandise.

   a. Load delivers so that ______________________ deliveries are near the door

   b. Plan ahead for any railroad crossings or rough roads and ______________________ merchandise accordingly

   c. Protect fragile and glass objects from breakage by adding additional ______________________

   d. Use ______________________ to secure boxes and keep them from falling

   e. Use ______________________ to support items that may roll around

10. Select true statements concerning general rules for customer delivery by placing an "X" in the appropriate blanks.

   ______a. Use a scratch pad to record facts about deliveries

   ______b. Leave a notice of an attempted delivery and designate whether the order should be picked up at store, if it has been left with neighbor, or when you will return with order

   ______c. Wear any attire for job

   ______d. Be friendly and courteous at all times

   ______e. Obey most traffic laws

TEST

_____f. Lock delivery truck when left unattended

_____g. Know what to do in the event of an accident and notify your supervisor as soon as possible

_____h. Enter customer's buildings or home without permission

_____i. Shut gates that are opened as a result of delivery

_____j. Do not leave a copy of bill with customer

_____k. It is not necessary to report damage that occurs to a customer's property or merchandise as a result of a delivery to the supervisor

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

11. Complete a purchase order.

12. Complete a worksheet on receiving merchandise.

13. Fill out a claim form.

ORDERING, RECEIVING, AND DELIVERY
UNIT II

ANSWERS TO TEST

1. a. 7
   b. 6
   c. 10
   d. 2
   e. 5
   f. 11
   g. 1
   h. 9
   i. 3
   j. 8
   k. 4

2. a. By mail
   b. By telephone
   c. Through a salesperson

3. a. Weigh
   b. Unit
   c. Open
   d. Purchase order

4. a. Invoice
   b. Purchase order
   c. Purchase order
   d. Carrier
   e. Invoice
   f. Price

5. a, b, f, g

6. a. 3
   b. 1
   c. 5
   d. 4
   e. 2

7. a. 1) Visible damage
   2) Cartons, merchandise
   3) Seals

   b. 1) Short or damaged
   2) Purchase order
   3) Substitutions
   4) Transportation

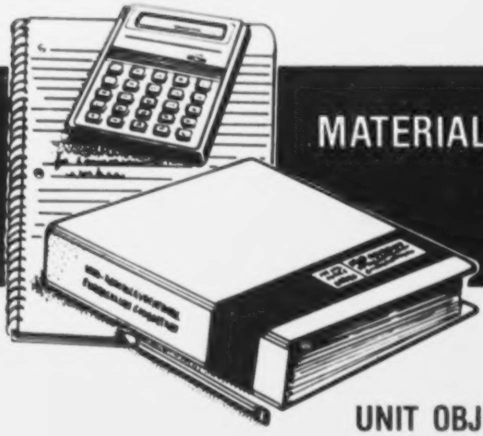
8. a, b

ANSWERS TO TEST

9.
   a. First
   b. Secure
   c. Wrapping
   d. Racks
   e. Sand bags

10. b, d, f, g, i

11.-13. Evaluated to the satisfaction of the instructor



MATERIALS-HANDLING EQUIPMENT
UNIT III

UNIT OBJECTIVE

After completion of this unit, the student should be able to select factors affecting equipment operation and identify proper procedures for using materials-handling equipment. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheet and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Define terms related to materials-handling equipment.
2. Match common types of materials-handling equipment with their uses.
3. List types of equipment maintenance operations.
4. Select factors affecting equipment operation.
5. Select true statements concerning general safety rules.
6. Complete a list of steps in lifting heavy objects.
7. Select true statements concerning proper procedures for using a hand truck.
8. Complete a list of statements concerning proper procedures for using a forklift truck.
9. Circle the words which best complete statements concerning proper procedures for using a ladder.
10. Identify proper procedures for using materials-handling equipment.

MATERIALS-HANDLING EQUIPMENT
UNIT III

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Explain how the differences in merchandise determine the equipment needed for handling.

VII. Demonstrate proper use of materials-handling equipment and/or take students on a field trip to view equipment in operation.

VIII. Provide specific safety rules for students who will be using materials-handling equipment on job.

IX. Have students select a piece of equipment they will be using and write a preventive maintenance program for it.

X. Have students develop a list of safety rules pertaining to materials-handling equipment and then discuss them in class.

XI. Demonstrate how to lift a heavy object safely.

XII. Have students make posters which can be used to promote safety in using materials-handling equipment.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Common Types of Materials-Handling Equipment

    2. TM 2 — How to Lift Safely

INSTRUCTIONAL MATERIALS

3. TM 3 — Proper Use of a Ladder

D. Assignment Sheet #1 — Identify Proper Procedures for Using Materials-Handling Equipment

E. Answers to assignment sheet

F. Test

G. Answers to test

II. Reference — Hatchett, Melvin S. *Warehousing*. Austin, TX: Instructional Materials Services, University of Texas at Austin, 1974.

MATERIALS-HANDLING EQUIPMENT
UNIT III

INFORMATION SHEET

I. **Terms and definitions**

A. Maintenance — Any actions necessary to keep equipment in a safe and serviceable condition

B. Materials-handling equipment — Stationary or mobile equipment, powered mechanically or by hand, that is used for physical handling, storage, and movement of materials, merchandise, and supplies

C. Preventive maintenance — Systematic care, inspection, and servicing of equipment to keep it usable

(NOTE: A good preventive maintenance program will detect and correct problems before extensive repairs or replacements are needed.)

II. **Common types of materials-handling equipment** (Transparency 1)

A. Conveyor — Mechanically operated equipment, either fixed or mobile, which moves merchandise between two points in a fixed line of travel

B. Forklift truck — Vehicle designed to pick up, carry, and stack large loads of merchandise and equipment

(NOTE: Forklift trucks are available in many different designs and models and have lifting capacities ranging from 1,000 to 10,000 pounds.)

C. Hand truck — Manually operated piece of equipment used for hauling short distances and is generally limited to low-volume handling and bulky items such as sacks of feed or large cartons

D. Pallet handlift truck — Used to move pallet loads that do not have to be stacked and where short hauls are required

(NOTE: This piece of equipment works well with forklift trucks and can be operated where a forklift cannot, because of space limitations and limited floor load capacity.)

E. Skid handlift truck — Manually operated piece of equipment similar to a pallet truck, except it has a platform rather than forks and is used to transport skids rather than pallets

INFORMATION SHEET

III. **Types of equipment maintenance operations**

A. Cleaning

B. Inspecting

C. Servicing

D. Adjusting

E. Repairing

F. Rebuilding

G. Modification

IV. **Factors affecting equipment operation**

A. Improper, careless, or negligent use

B. Lack of lubrication, overlubrication, or use of unauthorized lubricants

C. Inadequate maintenance inspections

D. Lack of proper servicing or adjustment

E. Attempts by unqualified employees to repair equipment

F. Use of improper or inadequate tools and equipment

V. **General safety rules**

(NOTE: Accidents do not just happen, they are caused.)

A. Do not use or turn on any equipment unless you are authorized to do so

B. Observe safe operating procedures on all equipment

C. Report any condition that may cause injury to self or fellow employees

D. Keep aisles and passageways clear

E. Maintain proper conduct, attitude, cooperation, and behavior

(NOTE: Do not engage in horseplay.)

F. Do not try to work too fast; take time to do the job right

G. Lift heavy objects properly

INFORMATION SHEET

VI. **Steps in lifting heavy objects** (Transparency 2)

A. Stand with feet 8 to 12 inches apart for good balance

B. Bend knees to a position that is comfortable, keeping back straight

C. Get a firm grip on object

D. Lift straight up with your legs, keeping the object close to your body

E. Reverse the procedure to set an object down

(NOTE: Get help if a load is too heavy.)

VII. **Proper procedures for using a hand truck**

A. Never load any higher than shoulder level so that view of area ahead is clearly visible

B. Avoid overloading to guard against the possibility of merchandise falling off truck

C. Push truck in front of you

D. Move through aisles carefully, slowing down for corners and bumps

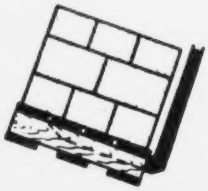
VIII. **Proper procedures for using a forklift truck**

(NOTE: Never operate a forklift without prior instruction and approval from warehouse supervisor.)

A. Keep forks as low as possible when moving and keep them level when picking up and placing pallets

B. Avoid overloading to guard against the possibility of goods falling off truck

C. Transport a pallet load with forks tilted slightly backward



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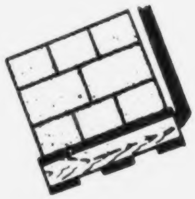
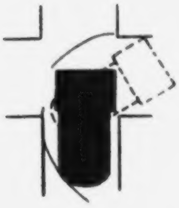


Wrong

INFORMATION SHEET

D. Keep inside when turning sharp corners

(NOTE: Do not start a turn from the middle of an aisle.)



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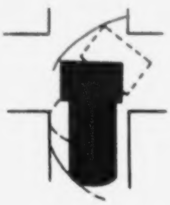
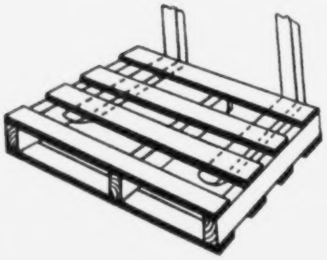


Wrong

E. Spread the forks as wide as possible in moving pallets to provide equal distribution of weight and balance



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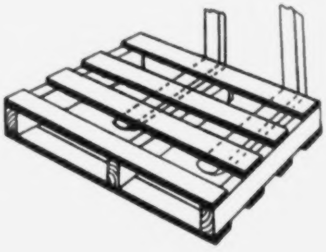
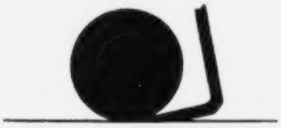


Wrong

F. When handling rolls and drums, keep the tip of fork touching the floor to avoid damage to goods and difficulty in loading



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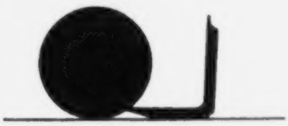


Wrong

INFORMATION SHEET

IX. **Proper procedures for using a ladder** (Transparency 3)

A. Check for broken or unsafe parts

B. Set ladder firmly in place to keep it from slipping

C. Set a straight ladder approximately 1/4 its length from wall

D. Open stepladder fully before using

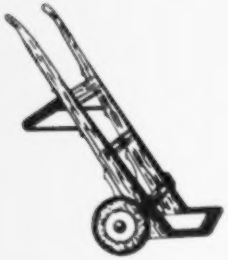
E. Face ladder when climbing up or down

F. Use both hands when climbing ladder

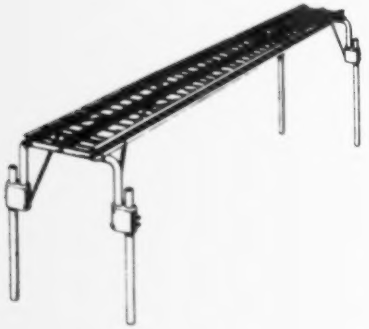
G. Never stand on the top two rungs

H. Allow only one person on ladder at a time

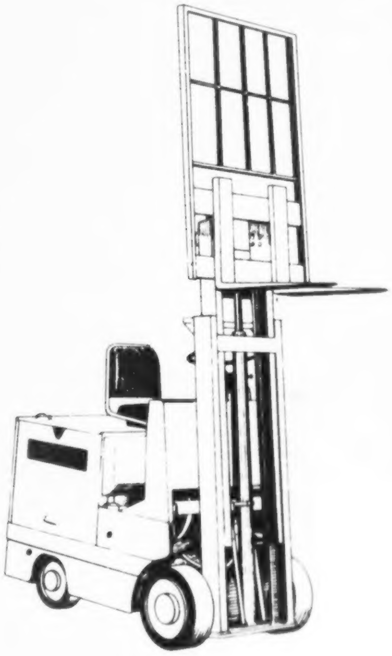
Common Types of Materials-Handling Equipment



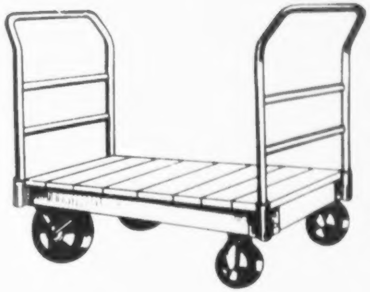
Two-wheel Hand Truck



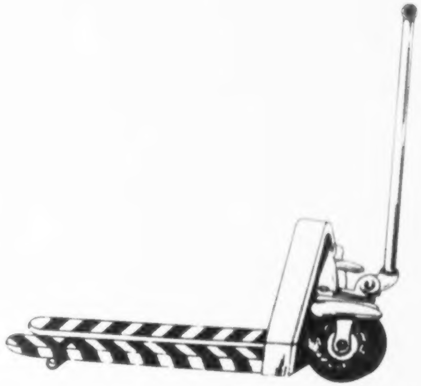
Conveyor



Forklift



Four-wheel Platform Hand Truck

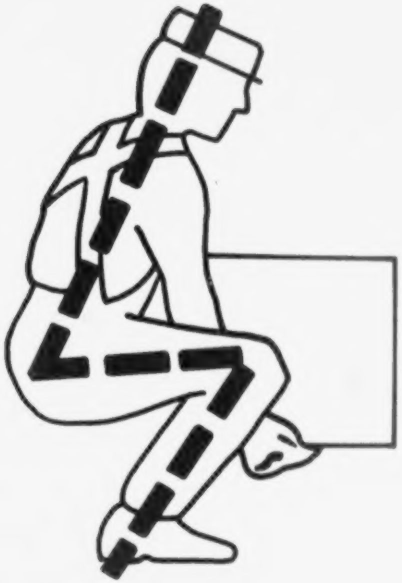


Palletlift Truck

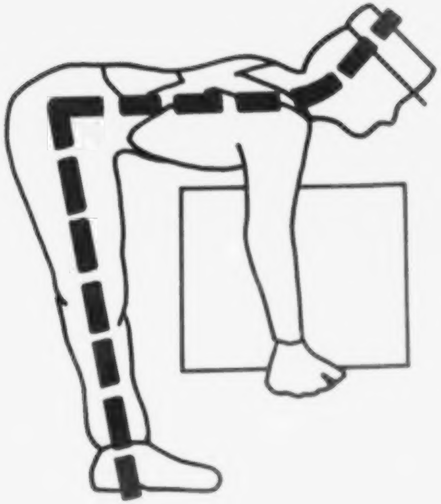
TM 1

EA - 85-D

How to Lift Safely

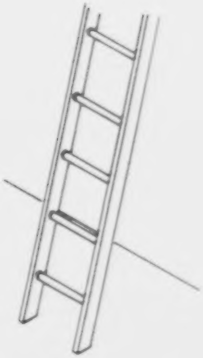


LIFT THIS WAY

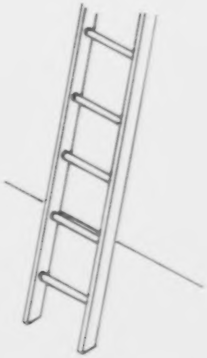


NOT THIS WAY

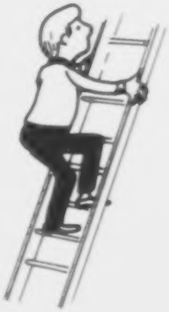
Proper Use of a Ladder



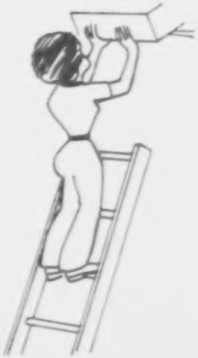
Check for broken or unsafe parts



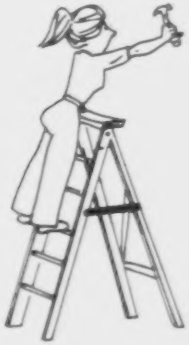
Ladder ¼ length from wall



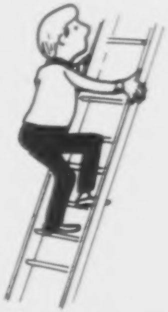
Use both hands



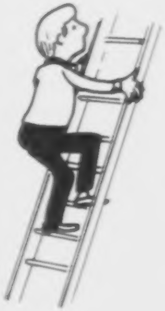
Never stand on top rungs



Open stepladder fully



Face ladder when going up or down—never jump off



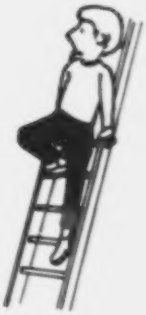
Only one person on a ladder

MATERIALS-HANDLING EQUIPMENT
UNIT III

ASSIGNMENT SHEET #1 — IDENTIFY PROPER PROCEDURES FOR USING MATERIALS-HANDLING EQUIPMENT

Directions: Circle the examples which best represent proper procedures for using materials-handling equipment, and explain why.

A. 1.



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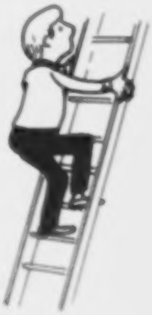

Why?

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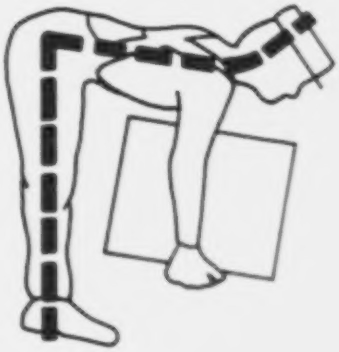
B. 1.



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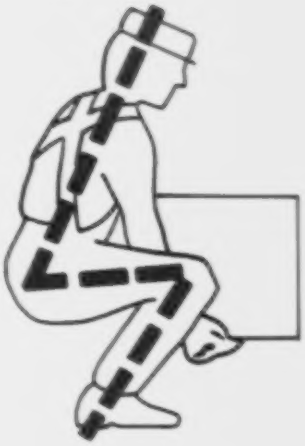

Why?

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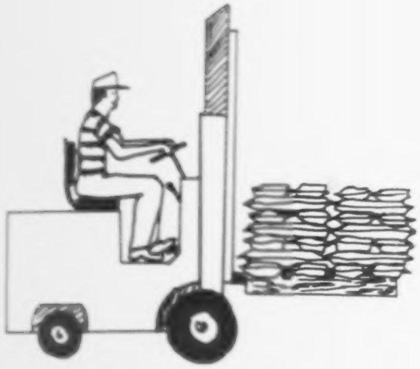
ASSIGNMENT SHEET #1

C. 1.



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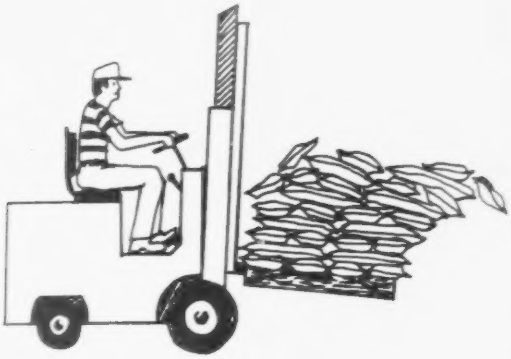

Why?

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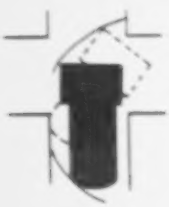
D. 1.



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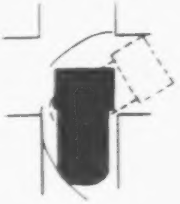

Why?

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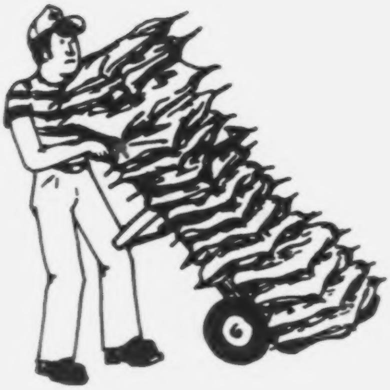
ASSIGNMENT SHEET #1

E. 1.



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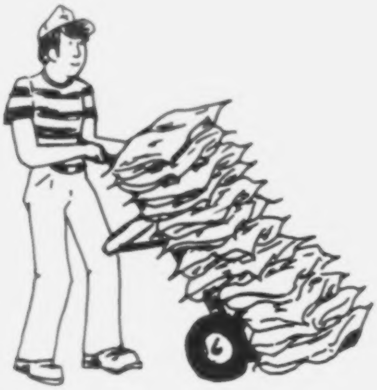

Why?

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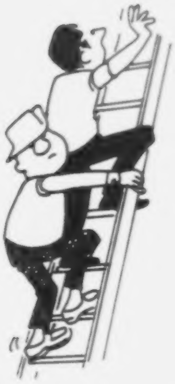
F. 1.



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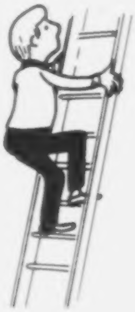

Why?

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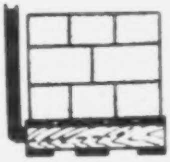
ASSIGNMENT SHEET #1

G. 1.



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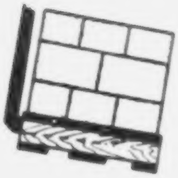

Why?

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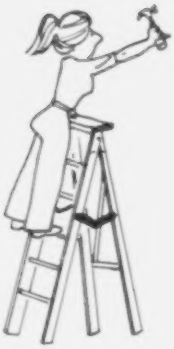
H. 1.



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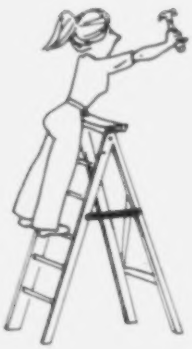

Why?

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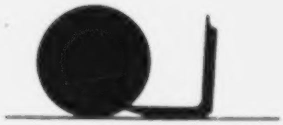
ASSIGNMENT SHEET #1

I. 1.



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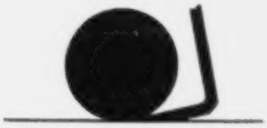
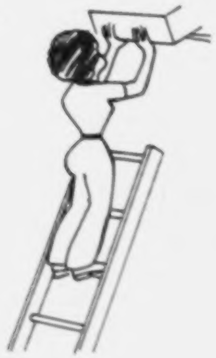


Why?

J. 1.



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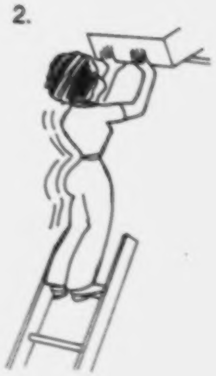
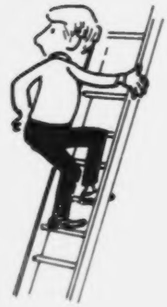


Why?

ASSIGNMENT SHEET #1

K. 1.



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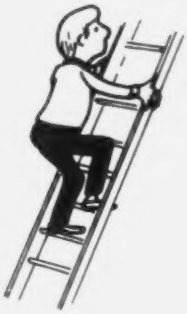

Why?

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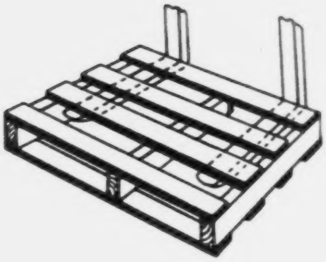
____

L. 1.



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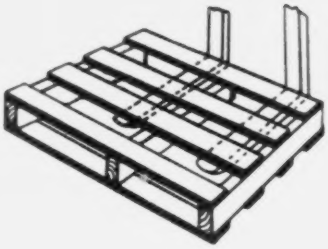

Why?

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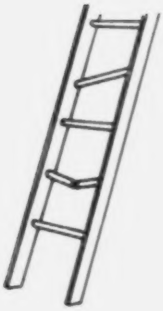
____

ASSIGNMENT SHEET #1

M. 1.



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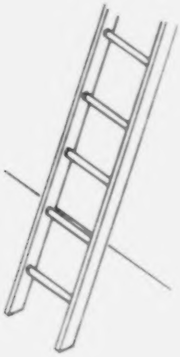


Why?

____

____

MATERIALS-HANDLING EQUIPMENT
UNIT III

ANSWERS TO ASSIGNMENT SHEET

A. 2. Face ladder when going up or down

B. 2. Bend knees to a position that is comfortable, keeping back straight

C. 1. Avoid overloading to guard against the possibility of merchandise falling off truck

D. 2. Keep inside when turning sharp corners

E. 2. Never load any higher than shoulder level so that view of area ahead is clearly visible

F. 2. Allow only one person on a ladder at one time

G. 1. Transport a pallet load with forks tilted slightly backward

H. 2. Open stepladder fully before using

I. 2. Keep the tip of the fork touching the floor to avoid damage to goods and difficulty in loading

J. 1. Never stand on the top two rungs

K. 2. Use both hands when climbing ladder

L. 1. Spread forks as wide as possible in moving pallets to provide equal distribution of weight and balance

M. 2. Check for broken or unsafe parts

MATERIALS-HANDLING EQUIPMENT
UNIT III

NAME ______________________________

TEST

1. Define terms related to materials-handling equipment.

   a. Maintenance — ____

   ____

   ____

   b. Materials-handling equipment — ______________________________

   ____

   ____

   c. Preventive maintenance — ___________________________________

   ____

   ____

2. Match common types of materials-handling equipment on the right with their uses.

   _____a. Vehicle designed to pick up, carry, and stack large loads of merchandise and equipment

   _____b. Used to move pallet loads that do not have to be stacked and where short hauls are required

   _____c. Mechanically operated equipment, either fixed or mobile, which moves merchandise between two points in a fixed line of travel

   _____d. Manually operated piece of equipment used for hauling short distances and is generally limited to low-volume handling and bulky items such as sacks of feed or large cartons

   _____e. Manually operated piece of equipment similar to a pallet truck, except it has a platform rather than forks and is used to transport skids rather than pallets

   1. Hand truck
   2. Forklift truck
   3. Skid handlift truck
   4. Conveyor
   5. Pallet handlift truck

TEST

3. List five types of equipment maintenance operations.

   a. ____

   b. ____

   c. ____

   d. ____

   e. ____

4. Select factors affecting equipment operation by placing an "X" in the appropriate blanks.

   ______a. Improper, careless, or negligent use

   ______b. Lack of lubrication, overlubrication, or use of unauthorized lubricants

   ______c. Lack of proper servicing or adjustment

   ______d. Attempts by unqualified customers to repair equipment

   ______e. Use of improper or inadequate tools and equipment

   ______f. Inadequate maintenance inspections

5. Select true statements concerning general safety rules by placing an "X" in the appropriate blanks.

   ______a. Use or turn on any equipment even if your aren't authorized to do so

   ______b. Observe safe operating procedures on all equipment

   ______c. Report any condition that may cause injury to self or fellow employees

   ______d. Keep aisles and passageways blocked

   ______e. Maintain proper conduct, attitude, cooperation, and behavior

   ______f. Lift heavy objects any way you can

6. Complete the following list of steps in lifting heavy objects.

   a. Stand with feet ____________________ to ____________________ inches apart

   b. Bend knees to a position that is comfortable, keeping ____________________ straight

TEST

c. Get a ______________________ on object

d. Lift straight up with your legs, keeping object ______________________ to your body

e. ______________________ the procedure to set an object down

7. Select true statements concerning proper procedures for using a hand truck by placing an "X" in the appropriate blanks.

_____a. Never load any higher than waist level so that view of area ahead is clearly visible

_____b. Avoid overloading to guard against the possibility of merchandise falling off truck

_____c. Pull truck behind you

_____d. Move through aisles carefully, slowing down for corners and bumps

8. Complete the following list of statements concerning proper procedures for using a forklift truck.

a. Keep forks as ______________________ as possible when moving and keep them level when picking up and placing pallets

b. Transport a pallet load with forks tilted slightly ______________________

c. Keep ______________________ when turning sharp corners

d. Spread the forks as ______________________ as possible in moving pallets to provide equal distribution of weight and balance

e. When handling rolls and drums, keep the tip of the fork touching the ______________________ to avoid damage to goods and difficulty in loading

9. Circle the words which best complete the following statements concerning proper procedures for using a ladder.

a. **(Check for, Ignore)** broken or unsafe parts

b. Set ladder **(loosely, firmly)** in place to keep it from slipping

c. Set a straight ladder approximately **($^1/_4$, $^1/_8$)** its length from the wall

d. Open stepladder **(fully, partially)** before using

e. Use **(both, one)** hand(s) when climbing ladder

TEST

f. Never stand on the top **(four, two)** rungs

g. Allow only **(one person, two people)** on ladder at a time

(NOTE: If the following activity has not been accomplished prior to the test, ask your instructor when it should be completed.)

10. Identify proper procedures for using materials-handling equipment.

MATERIALS-HANDLING EQUIPMENT
UNIT III

ANSWERS TO TEST

1. a. Any actions necessary to keep equipment in a safe and serviceable condition
   b. Stationary or mobile equipment, powered mechanically or by hand, that is used for physical handling, storage, and movement of materials, merchandise, and supplies
   c. Systematic care, inspection, and servicing of equipment to keep it usable

2. a. 2
   b. 5
   c. 4
   d. 1
   e. 3

3. Any five of the following:

   a. Cleaning
   b. Inspecting
   c. Servicing
   d. Adjusting
   e. Repairing
   f. Rebuilding
   g. Modification

4. a, b, c, e, f

5. b, c, e

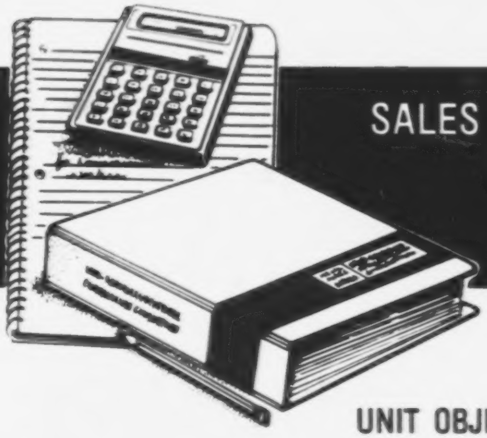
6. a. 8, 12
   b. Back
   c. Firm grip
   d. Close
   e. Reverse

7. b, d

8. a. Low
   b. Backward
   c. Inside
   d. Wide
   e. Floor

9. a. Check for
   b. Firmly
   c. ¼
   d. Fully
   e. Both
   f. Two
   g. One person

10. Evaluated to the satisfaction of the instructor



SALES TECHNIQUES
UNIT I

UNIT OBJECTIVE

After completion of this unit, the student should be able to determine customer needs, overcome customer objections, and prepare and give a sales demonstration. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to sales techniques with their correct definitions.
2. List duties of a salesperson.
3. Select true statements concerning abilities of a successful salesperson.
4. Match traits of a successful salesperson with their meaning.
5. Select true statements concerning recognizing and helping different types of customers.
6. Select buying motives.
7. List five basic buying decisions of the customer.
8. Discuss briefly common types of sales resistance.
9. Complete a list of statements concerning the importance of product knowledge.
10. Select general areas of product knowledge.
11. Complete a list of statements concerning using product knowledge.

OBJECTIVE SHEET

12. Select sources of product information.

13. List main sources of prospect names.

14. Match basic steps in selling with their characteristics.

15. List five stages of a sale regarding the customer.

16. Complete a list of statements concerning do's and don'ts of a successful sales presentation.

17. Select true statements concerning basic rules for a successful demonstration.

18. Complete a list of statements concerning the do's and don'ts of closing a sale.

19. Select true statements concerning handling complaints and adjustments.

20. Rate your sales personality.

21. Complete a worksheet on determining customer needs.

22. Complete a worksheet on overcoming customer objections.

23. Solve a problem concerning prospecting techniques.

24. Solve a problem dealing with the importance of good sales techniques.

25. Evaluate a sales demonstration.

26. Prepare and give a sales demonstration.

SALES TECHNIQUES
UNIT I

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Discuss unit and specific objectives.

IV. Discuss information and assignment sheets.

V. Have students develop a list of at least ten ways to greet a customer. Share ideas with class and discuss.

VI. Discuss ways of handling interruptions during a sale.

VII. Discuss the need for being able to repeat a sales demonstration over and over and the need for consistency in the presentation.

VIII. Have a successful salesperson from an area agribusiness give a sales demonstration to class.

IX. Have class break into groups and put on short skits on how to recognize and help different customer types.

X. Have students role play different customer situations such as the initial greeting, handling objections, and closing the sale.

XI. Have students evaluate sales personalities.

XII. Have students visit an agribusiness to determine how problems/complaints are handled and have them role play the methods they observed during their visit.

XIII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1 — Duties of a Salesperson

      2. TM 2 — Buying Motives

      3. TM 3 — Basic Steps in Selling

INSTRUCTIONAL MATERIALS

D. Assignment sheets

   1. Assignment Sheet #1 — Rate Your Sales Personality

   2. Assignment Sheet #2 — Complete a Worksheet on Determining Customer Needs

   3. Assignment Sheet #3 — Complete a Worksheet on Overcoming Customer Objections

   4. Assignment Sheet #4 — Solve a Problem Concerning Prospecting Techniques

   5. Assignment Sheet #5 — Solve a Problem Dealing with the Importance of Good Sales Techniques

   6. Assignment Sheet #6 — Evaluate a Sales Demonstration

   7. Assignment Sheet #7 — Prepare and Give a Sales Presentation

E. Answers to assignment sheets

F. Test

G. Answers to test

II. References:

A. Ernest, John W. *Basic Selling*. Second Edition. New York: McGraw-Hill, Inc., 1978.

B. Ernest, John W. and Richard Ashmun. *Selling Principles and Practices*. Fifth edition. New York: McGraw-Hill, Inc., 1980.

C. Crissy, W.J.E., William H. Cunningham, and Isabella C.M. Cunningham. *Selling: The Personal Force in Marketing*. New York: John Wiley and Sons, Inc., 1977.

D. Carlile, Robert. *Agriculture Sales and Service*. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

E. Nelson, Frank W. *Distributive Education II*. Stillwater, OK: Oklahoma Curriculum and Instructional Materials Center, 1976.

SALES TECHNIQUES
UNIT I

INFORMATION SHEET

I. **Terms and definitions**

   A. Buying motives — Advantages that people want and the reasons that cause them to buy

   B. Buying signals — Indications from a customer that he/she is nearing the decision to buy

   C. "Closing the sale" — Asking the customer for the order

   (NOTE: This is the most important step in the selling process.)

   D. Complaint — Objection made after the sale, usually about unsatisfactory merchandise, slow delivery, or incorrect billing

   E. Need — The lack of something that is required or essential

   F. Product knowledge — Facts about a product which can be translated into specific benefits that fulfill the customer's needs or wants

   G. Prospecting — The process of looking for new customers through various means

   H. Selling — The process of determining the needs and wants of a customer and presenting a product, service, or idea in such a way that customer is motivated to make a favorable buying decision

   I. Trial close — A test to see if the customer is ready to buy

   J. Want — A desire, craving, or conscious longing that may not be essential

II. **Duties of a salesperson** (Transparency 1)

   A. Prospecting

   B. Conducting sales interviews

   C. Closing sales

   D. Servicing

   E. Following-up

   F. Handling complaints

   G. Administering credit programs

   H. Performing other duties common to other employees

INFORMATION SHEET

III. **Abilities of a successful salesperson**

A. Desiring to understand and serve people

B. Acquiring and using complete product knowledge

C. Being able to meet customer's needs

D. Organizing and giving an effective sales presentation

E. Following through to make sure customers are satisfied

IV. **Traits of a successful salesperson**

A. Confidence — Faith or trust in one's actions and abilities

B. Perserverance — To continue in a job or action despite opposition or discouragement

C. Responsibility — Carrying out promises or obligations one has made and seeing a job through

D. Tact — The ability to say and do the right thing to maintain a good relationship with the customer

E. Loyalty — Faithfulness to co-workers and the business

F. Enthusiasm — Excitement in performing an activity

G. Honesty — Fairness of conduct

H. Resourcefulness — Ability to take action quickly in a new situation or unexpected difficulty

I. Ambition — The desire to achieve to attain one's goals

J. Leadership — The ability to positively influence another person to meet a common goal

K. Oral expression — The ability to communicate one's thoughts and ideas to another individual in a manner in which it can be easily understood

L. Poise — Handling oneself in a self-assured, easy going manner

M. Good grooming — Having a clean and neat appearance and wearing conservative clothes that are suitable to the business

INFORMATION SHEET

V. Recognizing and helping different types of customers

A. Impulsive customer

  1. How to recognize

    a. Wants to buy quickly

    b. Doesn't want detailed information

    c. Changes mind frequently

  2. How to help

    a. Give quick service

    b. Give quick, to-the-point answers

B. Deliberate customer

  1. How to recognize

    a. Is slow and careful

    b. Is a good listener

    c. Wants merchandise facts and demonstrations

    d. Likes to see a variety of merchandise for comparison

    e. May be hard to please

  2. How to help

    a. Show merchandise with information and demonstration

    b. Show a variety of merchandise and guide the comparisons

    c. Don't rush decisions

C. Undecided customer

  1. How to recognize

    a. Usually knows need but is uncertain on what will satisfy the need

INFORMATION SHEET

        - b. Needs suggestions
        - c. Needs assurance that the right decision is being made
    - 2. How to help
        - a. Don't show too large an assortment
        - b. Show, explain, and demonstrate
        - c. Give honest compliments to build confidence
        - d. Help without forcing a decision
- D. Decided customer
    - 1. How to recognize
        - a. Tells exactly what he/she wants
        - b. Likes to make the decision by himself/herself
        - c. Likes to do the talking
    - 2. How to help
        - a. Show the merchandise quickly
        - b. Tell customer if merchandise is not available and quickly point out the benefits of a suitable substitute
- E. Very talkative customer
    - 1. How to recognize
        - a. Likes to talk
        - b. Is very friendly
        - c. Wanders off the subject of the product
    - 2. How to help
        - a. Respond in a friendly manner
        - b. Try to keep the conversation on the subject

INFORMATION SHEET

F. Silent customer

1. How to recognize

   a. Is not enthusiastic

   b. Does not seem to want to make a decision

   c. May not seem to pay much attention

   d. May listen, but not comment

2. How to help

   a. Try to draw customer out by questioning

   b. Watch customer carefully for any signs of interest

   c. Avoid talking too much, but **do not allow conversation to lag**

G. Know-it-all customer

1. How to recognize

   a. Discredits all information given

   b. Is disagreeable

2. How to help

   a. Disarm the customer by not offering the resistance he/she expects

   b. Agree with the customer whenever possible

   c. Get in selling points by elaborating on those features considered important by the customer

   d. Appeal to customer's vanity by asking questions

   e. Let the customer do the talking

   f. Guard your remarks to keep from antagonizing the customer

   g. Let the customer make his/her own decision without letting him/her think that your help is needed

INFORMATION SHEET

VI. **Buying motives** (Transparency 2)

A. Convenience

B. Gain

C. Pleasure

D. Safety

E. Self-esteem

F. Group approval

G. Change

H. Impulse

VII. **Basic buying decisions of the customer**

A. Why should I buy

B. What type, brand, or style should I buy

C. Where should I buy

D. How much should I buy

E. When should I buy

VIII. **Common types of sales resistance**

A. Excuse — Customer gives an inadequate or false reason for not buying which may be caused by uncertainty or inability to make a decision

Example: Customer: "I'm just looking."

(NOTE: A salesperson can overcome this barrier by demonstrating an eagerness to help and showing an understanding of the customer's indecision.)

B. Objection — An actual adverse opinion that a customer has about a product because customer

1. Does not understand

2. Does not believe part of salesperson's explanation and demonstration

3. Is confused about a feature

INFORMATION SHEET

4. Missed part of demonstration

5. Is trying to justify paying the price

Example: Customer: "You're asking too much money for this tractor and I can't see that it will do anything mine can't already do."

IX. Importance of product knowledge

A. It gives salespeople confidence

B. It helps them overcome sales resistance and complete sales

C. It keeps sales presentation lively

D. It helps salespeople enjoy their work

E. It increases their chance of promotion in the future

X. General areas of product knowledge

A. Background and history of the product

B. Appearance of the product

C. Composition of the product

D. Processes used in manufacturing the product

E. Uses of the product

F. Serviceability of the product

G. Cost of the product

XI. Using product knowledge

A. Put facts into language a customer can understand

B. Facts should be used to persuade the customer to buy the product

C. Convert facts into benefits and selling points for that specific customer

D. Emphasize the positive selling points

E. Demonstrate the product to reinforce the selling points

INFORMATION SHEET

XII. **Sources of product information**

- A. Product manuals provided by manufacturers or company sources
- B. Leaflets shipped in packing boxes
- C. Trade association journals
- D. Testing bureau publications

  Example: *Doane's Report*, Nebraska Tractor Test, Extension Service
- E. Government publications
- F. Labels
- G. Guarantees
- H. Advertisements
- I. Other salespersons and buyers
- J. Customers

XIII. **Main sources of prospect names**

- A. Family and friends
- B. Present customers
- C. Inactive accounts
- D. Phone directory
- E. Newspapers
- F. Trade directories
- G. City permits
- H. Personal observation

XIV. **Basic steps in selling** (Transparency 3)

- A. Preparation
  - 1. Have product knowledge
  - 2. Know competitor's line

INFORMATION SHEET

B. Approach

(NOTE: The customer's first impression of you is the one that they will remember.)

1. Dress to fit the role of a successful salesperson
2. Be prompt, courteous, and provide a friendly atmosphere for the customer
3. Ask questions to determine customer needs and listen

C. Demonstration

1. Personalize the product to fit customer's needs
2. Involve customer in demonstration
3. Know the merchandise

   (NOTE: A salesperson should never get between the product and customer.)

D. Overcoming customer objections

1. Anticipate objections and prepare answers to them in advance
2. Know when to back off

   (NOTE: Accept what a customer says. Leave the door open to future sales opportunities.)

E. Closing the sale

1. Watch for buying signals

   Example: Customer getting checkbook and ink pen out

2. Make a trial close
3. Promote related items
4. Ask for the order
5. Handle sales transactions

INFORMATION SHEET

XV. **Stages of a sale regarding the customer**

- A. Attention
- B. Interest
- C. Desire
- D. Conviction
- E. Action

XVI. **Do's and don'ts of a successful sales presentation**

- A. Do sell the benefits that meet the customer's needs
- B. Do create pictures in the customer's mind of him/her using the product
- C. Do refer back to statements made by the customer
- D. Do use descriptive words and phrases
- E. Do avoid annoying or trite words or phrases

  Examples: You know? . . . Honey . . . Dear
- F. Do avoid using words too technical for the customer
- G. Do take an honest and sincere approach with the customer
- H. Do support statements with facts and figures whenever possible
- I. Do use charts, pamphlets, and posters when available to illustrate benefits
- J. Do talk as if the customer is going to buy the product
- K. Do use the words "you" and "let's" during the presentation

  (NOTE: This makes the customer feel he/she is not alone in the buying decision.)
- L. Don't argue or sound rude with a customer
- M. Don't judge a customer by the way he/she is dressed
- N. Don't mention price first; let the customer ask "How much?" then support price with a positive statement
- O. Don't be a know-it-all salesperson

INFORMATION SHEET

XVII. **Basic rules for a successful demonstration**

A. Plan and rehearse the demonstration

B. Direct the product's benefits to the customer

C. Demonstrate the main features first

D. Get the customer involved

E. Emphasize the positive points of the product

F. Ask questions

G. Get the customer to make a commitment

H. Be ready to close the sale

XVIII. **Do's and don'ts of closing a sale**

A. Do display a friendly manner at the close, even though there is disagreement between the customer and the salesperson

B. Do be sure to have all materials and equipment that will be needed

(NOTE: Misplaced order blanks, obsolete price lists, and pens that don't work can lose sales.)

C. Do realize that begging for a sale makes the salesperson and product look bad — it also disgusts the customer

D. Do ask the customer to "OK" or approve the order rather than sign it

E. Do make buying as easy and painless as possible

F. Do try for privacy at the close

(NOTE: Phone calls and third parties distract.)

G. Do study each customer as a baseball pitcher studies each batter

(NOTE: Pitch to the customer's weakness.)

H. Don't let the customer know how much the sale means

I. Don't be apologetic, particularly in quoting prices

J. Don't make written or oral promises unless authorized to do so; otherwise there will be friction and expense

INFORMATION SHEET

K. Don't make a ceremony out of closing

L. Don't give the customer an excuse or an opportunity to back away from the purchase

M. Don't ever ask the customer for the buying decision in such a way that a "yes" or a "no," answer is given, for the latter closes the door

N. Don't make it difficult for the customer to complete the purchase quickly, if that is preferred

XIX. Handling complaints and adjustments

(NOTE: Every business has specific rules for handling complaints, exchanges, and refunds. As an employee, you should know what the rules are. If you don't, check with your immediate supervisor.)

A. Show a sincere interest in helping the customer

B. Treat customer courteously

C. Obtain the facts to determine the problem

(NOTE: Be tactful when asking questions and examine the merchandise carefully.)

D. Determine the cause of the problem

E. Never say that the customer is wrong

F. Take prompt action to correct the problem

G. Resell the customer

(NOTE: Even if the customer is at fault, point out the advantages of the product when used correctly.)

Duties of a Salesperson

A. Prospecting

B. Conducting sales interviews

C. Closing sales

D. Servicing

E. Following-up

F. Handling complaints

G. Administering credit programs

H. Performing duties common to other employees

Buying Motives

A. Convenience
B. Gain
C. Pleasure
D. Safety
E. Self-esteem
F. Group approval
G. Change
H. Impulse

Basic Steps in Selling

A. Preparation
B. Approach
C. Demonstration
D. Overcoming customer objections
E. Closing the sale

EA-23-E

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #1 — RATE YOUR SALES PERSONALITY

Directions: The purpose of this assignment sheet is to help you form an opinion of your sales personality and rate yourself on ten (10) important qualities of an effective salesperson. Be as objective as possible. Place an "X" in the appropriate blank. Total the points at the side of each blank marked and compare with the rating scale.

1. **Confidence**

To what extent do you succeed in winning the confidence, respect, and goodwill of your friends and classmates?

____Exceptionally successful (10)
____Usually successful (7)
____About 50-50 (5)
____Seldom (3)
____Never (0)

2. **Perseverance**

To what extent are you capable of sustained effort (staying at a task until it is finished)?

____Always stick with it (10)
____Sometimes discouraged (7)
____Easily discouraged (5)
____Seldom (3)
____Never (0)

3. **Responsibility**

How responsible (reliable) are you in performing your work?

____Thoroughly responsible (10)
____Ordinarily responsible (7)
____About 50-50 (5)
____Seldom (3)
____Never (0)

4. **Tact**

To what extent do you say or do things without hurting the feelings or incurring the ill opinion of others?

____Always tactful (10)
____Generally tactful (7)
____About 50-50 (5)
____Seldom (3)
____Offend others constantly (0)

ASSIGNMENT SHEET #1

5. **Loyalty**

Would you stand behind your employer and stand up for what you believe is right?

_____Always loyal (10)
_____Usually loyal (7)
_____Hesitate (5)
_____Give up easily (3)
_____Never stand firm (0)

6. **Resourcefulness**

How resourceful are you in taking action quickly in a new or unexpected situation?

_____Exceedingly resourceful (10)
_____Fairly resourceful (7)
_____So-so (5)
_____Seldom resourceful (3)
_____Never resourceful (0)

7. **Leadership**

How well can you lead, direct, or influence others?

_____Can lead forcefully (10)
_____Lead most of the time (7)
_____To a certain extent (5)
_____Usually avoid leadership (3)
_____Never (0)

8. **Oral expression**

How well do you use the English language?

_____Exceptionally well (10)
_____Better than average (7)
_____About average (5)
_____Poorly, make many errors (3)
_____Very poorly, hard to understand (0)

9. **Poise**

To what extent are you poised (maintain self-control)?

_____Exceptionally well poised (10)
_____Usually well poised (7)
_____About average (5)
_____Lose control frequently (3)
_____Rarely poised (0)

10. **Honesty**

To what extent are you honest?

_____Always (10)
_____Usually (7)
_____About 50-50 (5)
_____Rarely(3)
_____Never (0)

Total score ______________________________

ASSIGNMENT SHEET #1

Rating

90-100 — Excellent. You have the traits of a great salesperson.
80-90 — Good. You will be a successful salesperson.
70-80 — Fair. With a little work you can succeed in the sales market.
69 and below — Meet with your instructor to determine areas where you are weakest and work to improve your rating.

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #2 — COMPLETE A WORKSHEET ON DETERMINING CUSTOMER NEEDS

Directions: Below are some problems where you are to assume the salesperson's role and ask questions to find out what the customer needs. Write the questions you would ask below each problem.

A. Mrs. Kellum comes into your store and says, "My yard is full of weeds and I need something to get rid of them."

____

____

____

____

B. Mr. Perkins, a local wheat farmer walks into the store and says, "My tractor is falling apart. What do you have?"

____

____

____

____

C. An elderly lady comes in your store and asks for something to get rid of fleas in her home.

____

____

____

____

ASSIGNMENT SHEET #2

D. A man walks in your store and says "Let me have some baling twine."

____

____

____

____

E. John Farmer, one of your neighbors, comes in and says, "I want to have a garden this year. Give me what I need to get started."

____

____

____

____

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #3 — COMPLETE A WORKSHEET ON OVERCOMING CUSTOMER OBJECTIONS

Directions: Below is a list of customer objections. Briefly state how you would handle each objection.

A. The price is too high.

B. I must consult my husband first.

C. I want to shop around a little.

D. I think I can do better somewhere else.

ASSIGNMENT SHEET #3

E. I'm too tired to know what I want.

F. I really can't afford this.

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #4 — SOLVE A PROBLEM CONCERNING PROSPECTING TECHNIQUES

Directions: Complete the reading assignment and answer the following questions.

Jack Whipple sells for a well-known feed company. He finds that he is spending over 75 percent of his time prospecting, leaving only 25 percent for actual selling.

Jack hired a young man whose time is worth considerably less than his own. The junior salesperson spends all his time canvassing for prospects. Jack has provided his young associate with a written copy of the sales talk he uses with his "hot" prospects. Jack also has his junior salesperson accompany him on a number of calls so that the young man can learn "how it's done." Jack has made it clear to the young man that when he finds a prospect, his job is to set up an appointment for Jack, who will keep the appointment and attempt to make a complete sales presentation and close the sale. Jack has agreed to pay his sales associate 20 percent of the commissions earned on completed sales.

Jack figured that this system of prospecting would net him three times as much selling time as he previously had and that he ought to be able to close four times as many sales. However, it does not seem to be working out that way. The leads furnished by the junior salesperson are difficult to close. A number of prospects have told Jack that they already have heard the story about the product. All they want to know about is the price. Some of the prospects mistakenly thought that it was lower in price than actually quoted.

The young man is getting discouraged. He does not seem to be getting what he would consider to be a fair number of prospects out of his canvassing efforts. He complained to Jack, "When I do get to a farm, I find even after spending an hour there that I get turned down too many times."

A. Identify the problem.

ASSIGNMENT SHEET #4

B. Give a possible solution to the problem.

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #5 — SOLVE A PROBLEM DEALING WITH THE IMPORTANCE OF GOOD SALES TECHNIQUES

Directions: Complete the reading assignment and then answer the following questions.

Jack Dawson is a salesperson for the Quality Seed Company. He really feels that he is an above-average salesperson and that he has a good knowledge of sales techniques, but he does not seem to be getting anywhere. He barely met his quota in his territory last month, and he seems to have trouble selling to the big potential customers. Just the other day he lost a big order to Sam Bronson, who works for the ABC Seed Company. Jack knows he has a better product than Sam, but he just does not seem to get the breaks.

Jack had a heart-to-heart talk with his sales manager, but all the sales manager could say to him was, "Jack, you've got to do it yourself. This game of selling is rough. It takes a real salesperson to rise above the others and land those big orders. I know you can do it, because I feel you are a good salesperson."

Jack was the star quarterback for his high school football team. his team won the conference three years in a row, and Jack won the conference "Most Valuable Player" award. Jack remembers how those pep talks in the locker room helped when a guy was down. His old ball team depended upon the coach to raise their enthusiasm and build up their strength, and then they went out to win in the second half. Jack wonders why his sales manager cannot be like that coach.

A. Identify the problem.

ASSIGNMENT SHEET #5

B. Give a possible solution to the problem.

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #6 — EVALUATE A SALES DEMONSTRATION

Directions: Observe a sales demonstration which may be presented by another student, the instructor, or a local salesperson. Evaluate their presentation using the rating sheet on the next page. Pay particular attention to their use of descriptive words and product knowledge.

(NOTE: Check with your instructor to determine who should be used in the evaluation.)

ASSIGNMENT SHEET #6

SALES DEMONSTRATION
Rating Sheet

Salesperson's Name ________________________

Type of Merchandise Sold ________________________

RATING SCALE
Superior 80-100
Excellent 60-79
Good 40-59

	Poor	Fair	Good	Excellent	Points Earned
APPROACH: (Possible Points - 10) 1. Alertness (2 pts.) 2. Sincerity (2 pts.) 3. Approached the customer correctly for the selling situation (2 pts.) 4. Used an appropriate greeting (2 pts.) 5. Appearance (2 pts.)	0-1-2	3-4-5	6-7-8	9-10	________
PRESENTATION: (Possible Points - 25) 1. Was presentation clear? (5 pts.) 2. Were benefits shown? (5 pts.) 3. Was customer given an opportunity to talk and ask questions? (5 pts.) 4. Was sufficient merchandise information given? (5 pts.) 5. Was presentation too rapid or too slow? (5 pts.)	0-7	8-14	15-22	23-25	________
HANDLING OBJECTIONS: (Possible Points - 15) 1. Was each objection answered? (5 pts.) 2. Was tact used in handling objections? (5 pts.) 3. Was customer given an opportunity to voice objections? (5 pts.)	2-3-4	6-7-8	10-11-12	13-14-15	________
VOICE: (Possible Points - 15) 1. Was volume too loud or too soft? (5 pts.) 2. Was voice clear? (5 pts.) 3. Was tone varied or monotonous? (5 pts.)	2-3-4	6-7-8	10-11-12	13-14-15	________
CLOSE: (Possible Points - 20) 1. Was close smooth and natural (10 pts.) 2. Did contestant take advantage of opportunities to close? (10 pts.)	1-3-5	6-8-10	11-13-15	16-18-20	________
SUGGESTION SELLING: (Possible Points - 15) 1. Was this a smooth and natural part of the sale? (5 pts.) 2. Did contestant select a properly related item to suggest? (5 pts.) 3. Was the timing proper for the suggestions of a related item? (5 pts.)	2-3-4	6-7-8	10-11-12	13-14-15	________
TOTAL POSSIBLE POINTS 100			**TOTAL POINTS EARNED**		________

SALES TECHNIQUES
UNIT I

ASSIGNMENT SHEET #7 — PREPARE AND GIVE A SALES DEMONSTRATION

PART A

Directions: Select an ag-related product and prepare a sales demonstration following guidelines presented in the information sheet. Briefly outline your demonstration in the space below.

Preparation — ______________________________

____

____

Approach — ______________________________

____

____

Demonstration — ______________________________

____

____

Handling objections — ______________________________

____

____

Close — ______________________________

____

____

PART B

Directions: Perform a sales demonstration using the outline prepared in Part A being careful to include descriptive words, adequate product knowledge, and visual aids, if applicable. Have students rate your performance using copies of the rating sheet in Assignment Sheet #6.

SALES TECHNIQUES
UNIT I

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #1 — Evaluated to the satisfaction of the instructor

Assignment Sheet #2

(NOTE: Suitable answers may include some or all of the following questions. Other questions may be asked and student's answers should be evaluated by the instructor.)

A. What type of weeds do you have in your yard?
Would you bring samples of your weeds in so we can identify them and suggest a suitable weed killer?
How large is the area that needs to be treated?
Do yo prefer a dry application or spray?

B. What type of tractor do you presently own?
What type of crops do you plant?
What features are important to you on a tractor?
What accessory items will you need for your tractor?
Do you wish to trade your old tractor in?

C. What type of pet do you have?
Would you like a dip or spray to treat your animal?
Will the furniture or carpet need to be treated?
How much area needs to be treated?

D. Will the twine be used for square or round bales?
How long do you expect to keep the bales?
Would you prefer plastic or sissal?
If plastic, do you need 9,000 feet or 20,000 feet to the box?
How much do you want to pay?

E. What garden tools do you already have at home that are usable?
How large a garden do you plan to plant?
What fruits and vegetables do you wish to grow?
Do you prefer seeds or plant starts?
What type of soil do you have? Has it been tested for mineral deficiency?
Would you like to fence the garden off to keep animals out?

Assignment Sheet #3

A. Stress the benefits and buildup values of product. Stress the quality of the particular item. Compare higher priced article to less expensive one that doesn't have as many features. Know competitor's products so any questions the customer might have about differences in products can be explained.

ANSWERS TO ASSIGNMENT SHEETS

B. Provide customer with product information to share with spouse. If appropriate, make a future appointment with customer. Continue to show interest in customer even if sale will not be immediate. Ask customer questions to overcome any objections which might cause sale to be lost. Do not pressure customer to buy.

C. Re-emphasize quality and benefits of product. Provide customer with information to use in comparing product with competitor's product. Show continued interest in customer even if sale is not guaranteed. Ask if customer has any questions/concerns about product. Do not pressure customer to buy.

D. Know competitor's products and prices so differences can be discussed with customer. Emphasize the quality and usefulness of specific product. Provide names or experiences of satisfied customers with product. Stress that differences in quality and features may be reason competitor's product costs less and encourage customer to make a close comparison of products before buying.

E. Empathize with customer and suggest that a future appointment be made to discuss the product's features and benefits. Continue to show interest in customer and offer to provide customer with any information that might help in decision-making process.

F. Provide an article that is not as expensive which may suit customer's needs. It can also help justify the higher price of the more expensive product by comparing the two. This will give the customer a choice if price is really a determining factor. Discussing finance terms which are available is another way to promote the sale.

Assignment Sheet #4

A. Jack's new associate is giving the prospects more information than they need. The new associate should set the appointments but leave the sales presentation and price to Jack to avoid being inconsistent on the information or boring the customer the second time the presentation is given.

B. Jack either needs to have his associate stop giving the sales presentation or let him attempt to close the sale rather than simply set up an appointment. Perhaps Jack's new associate could develop a new canvassing approach to eliminate their duplication of the same material. They definitely need to get together and decide what role each will play in the sale.

As soon as Jack and his associate can arrive at who has what responsibility, sales should be on the increase. If the new associate followed up on his contacts, sales may be better since the prospect is already familiar with his personality.

ANSWERS TO ASSIGNMENT SHEETS

Assignment Sheet #5

A. Jack has lost confidence in himself and he is waiting for his sales manager to build him up, but the sales manager is falling short of Jack's expectations. Also, Jack may not be willing to face the fact that he is responsible for his lack of sales and only he can take the appropriate action to correct the situation.

B. Since Jack cannot rely on his sales manager for motivation, he needs to adjust his attitude. If Jack feels the products he sells are better than his competitors, he needs to identify the reasons and use them in his sales presentation. He needs to show confidence in both himself and the products he sells. If he cannot improve his attitude on his own, Jack should take a course or seminar on positive thinking.

Assignment Sheet #6 — Evaluated to the satisfaction of the instructor

Assignment Sheet #7 — Evaluated to the satisfaction of the instructor

SALES TECHNIQUES
UNIT I

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

______a. A desire, craving, or conscious longing that may not be essential

______b. The process of determining the needs and wants of a customer and presenting a product, service, or idea in such a way that customer is motivated to make a favorable buying decision

______c. Advantages that people want and the reasons that cause them to buy

______d. The lack of something that is required or essential

______e. Facts about a product which can be translated into specific benefits that fulfill the customer's needs or wants

______f. A test to see if the customer is ready to buy

______g. Objection made after the sale usually about unsatisfactory merchandise, slow delivery, or incorrect billing

______h. The process of looking for new customers through various means

______i. Asking the customer for the order

______j. Indications from a customer that he/she is nearing the decision to buy

1. Complaint
2. Prospecting
3. Buying motives
4. Want
5. Trial close
6. Need
7. Selling
8. Product knowledge
9. Buying signals
10. "Closing the sale"

2. List six duties of a salesperson.

a. ____

b. ____

c. ____

TEST

d. ____

e. ____

f. ____

3. Select true statements concerning abilities of a successful salesperson by placing an "X" in the appropriate blanks.

______a. Desiring to understand and serve people

______b. Acquiring and using complete product knowledge

______c. Being able to meet customer's needs

______d. Organizing and giving an effective sales presentation

______e. Following through to make sure customers are satisfied

4. Match the traits of a successful salesperson on the right with their correct meanings.

______a. Faith or trust in one's actions and abilities

______b. To continue in a job or action despite opposition or discouragement

______c. Carrying out promises or obligations one has made and seeing a job through

______d. The ability to say and do the right thing to maintain a good relationship with the customer

______e. Faithfulness to co-workers and the business

______f. Excitement in performing an activity

______g. Fairness of conduct

______h. Ability to take action quickly in a new situation or unexpected difficulty

______i. The desire to achieve to attain one's goals

______j. The ability to positively influence another person to meet a common goal

1. Leadership
2. Tact
3. Honesty
4. Confidence
5. Poise
6. Loyalty
7. Perserverance
8. Oral expression
9. Resourcefulness
10. Responsibility

TEST

______k. The ability to communicate one's thoughts and ideas to another individual in a manner in which it can be easily understood

______l. Handling oneself in a self-assured, easy going manner

______m. Having a clean and neat appearance and wearing conservative clothes that are suitable to the business

11. Good grooming

12. Ambition

13. Enthusiasm

5. Select true statements concerning recognizing and helping different types of customers by placing an "X" in the appropriate blanks.

______a. The impulsive customer usually needs suggestions and assurance that the right decision is being made; give honest compliments to build confidence and help without forcing a decision

______b. The deliberate customer is slow and careful, is a good listener, and wants merchandise facts and demonstrations

______c. Help a know-it-all customer by agreeing with the customer whenever possible, by appealing to customer's vanity, and guarding your remarks to keep from antagonizing the customer

______d. The decided customer tells exactly what he/she wants, likes to make the decision by himself/herself, and likes to do the talking

______e. Help a very talkative customer by responding in an indifferent manner and try to keep the conversation off the subject

______f. The silent customer is enthusiastic, seems to want to make a decision, and pays close attention

______g. Help the silent customer by trying to draw the customer out by questioning, watch customer carefully for any signs of interest, and do not allow conversation to lag

______h. The very talkative customer likes to talk, is very friendly, and wanders off the subject of the product

6. Select buying motives by placing an "X" in the appropriate blanks.

______a. Price

______b. Safety

TEST

______c. Convenience

______d. Pleasure

______e. Greed

______f. Self-esteem

______g. Group approval

______h. Impulse

7. List five basic buying decisions of the customer.

   a. ______________________________

   b. ______________________________

   c. ______________________________

   d. ______________________________

   e. ______________________________

8. Discuss briefly common types of sales resistance.

   a. Excuse — ______________________________

   ____

   ____

   b. Objection — ______________________________

   ____

   ____

9. Complete the following list of statements concerning the importance of product knowledge.

   a. It gives salespeople ______________

   b. It helps them overcome ______________ and complete sales

   c. It keeps sales presentation ______________

   d. It helps salespeople enjoy their work

   e. It increases their chance of ______________ in the future

TEST

10. Select general areas of product knowledge by placing an "X" in the appropriate blanks.

______a. Background and history of the product

______b. Appearance of the product

______c. Composition of the product

______d. Weaknesses of the product

______e. Uses of the product

______f. Processes used in manufacturing

______g. Markup of the product

______h. Serviceability of the product

11. Complete the following list of statements concerning using product knowledge.

a. Put ______________________ into language a customer can understand

b. Facts should be used to persuade the customer to ______________________

c. Convert facts into ______________________ and selling points for that specific customer

d. Emphasize the ______________________ selling points

e. ______________________ the product to reinforce the selling points

12. Select sources of product information by placing an "X" in the appropriate blanks.

______a. Leaflets shipped in packing boxes

______b. Trade association journals

______c. Friends and neighbors

______d. Competitors

______e. Government publications

______f. Guarantees

______g. Customers

______h. Advertisements

TEST

13. List six main sources of prospect names.

a. ____________________

b. ____________________

c. ____________________

d. ____________________

e. ____________________

f. ____________________

14. Match the basic steps in selling on the right with their characteristics.

_____a. Watch for buying signals; make a trial close; promote related items; handle sales transaction

_____b. Have product knowledge; know competitor's line

_____c. Personalize the product to fit customer's needs; involve the customer in demonstration; know the merchandise

_____d. Dress to fit the role of a successful salesperson; be prompt, courteous, and provide a friendly atmosphere for the customer; ask questions to determine customer needs and listen

_____e. Anticipate objections and prepare answers to them in advance; know when to back off

1. Preparation
2. Approach
3. Demonstration
4. Overcoming customer objections
5. Closing the sale

15. List five stages of a sale.

a. ____________________

b. ____________________

c. ____________________

d. ____________________

e. ____________________

TEST

16. Complete the following list of statements concerning do's and don'ts of a successful sales presentation by writing "Do" or "Don't" in the appropriate blanks.

    a. ___________sell the benefits that meet the customer's needs

    b. ___________create pictures in the customer's mind of him/her using the product

    c. ___________refer back to the statements made by the customer

    d. ___________judge a customer by the way he/she is dressed

    e. ___________use descriptive words and phrases

    f. ___________argue or sound rude with a customer

    g. ___________avoid using words too technical for the customer

    h. ___________support statements with facts and figures whenever possible

    i. ___________use the words "you" and "let's" during the presentation

    j. ___________mention price first; let the customer ask "How much?" then support with a positive statement

17. Select true statements concerning basic rules for a successful demonstration by placing an "X" in the appropriate blanks.

    ______a. Plan and rehearse the demonstration

    ______b. Direct the product's benefits to the customer

    ______c. Demonstrate the main features last

    ______d. Get the customer involved

    ______e. Emphasize the positive points of the product

    ______f. Don't ask questions

    ______g. Be ready to close the sale

TEST

18. Complete the following list of statements concerning do's and don'ts of closing a sale by writing "Do" or "Don't" in the appropriate blanks.

a. __________make a ceremony out of closing

b. __________be sure to have all materials and equipment that will be needed

c. __________ask the customer to "OK" or approve the order rather than sign it

d. __________try for privacy at the close

e. __________make written or oral promises unless authorized to do so; otherwise there will be friction and expense

f. __________ever ask the customer for the buying decision in such a way that "yes" or a "no" answer is given, for the latter closes the door

g. __________give the customer an excuse or an opportunity to back away from the purchase

h. __________display a friendly manner at the close, even though there is disagreement between the customer and the salesperson

i. __________realize that begging for a sale makes the salesperson and product look bad — it also disgusts the customer

j. __________let the customer know how much the sale means

k. __________make it difficult for the customer to complete his/her purchase quickly, if he/she cares to do so

l. __________be apologetic, particularly in quoting prices

m. __________study each customer as a baseball pitcher studies each batter

n. __________make buying as easy and painless as possible

19. Select true statements concerning handling complaints and adjustments by placing an "X" in the appropriate blanks.

_____a. Show a lack of interest in helping the customer

_____b. Treat customer courteously

_____c. Obtain the facts to determine the problem

TEST

_____d. Determine the cause of the problem

_____e. Say that the customer is wrong

_____f. Take little action to correct the problem

_____g. Resell the customer

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

20. Rate your sales personality.

21. Complete a worksheet on determining customer needs.

22. Complete a worksheet on overcoming customer objections.

23. Solve a problem concerning prospecting techniques.

24. Solve a problem dealing with the importance of good sales techniques.

25. Evaluate a sales demonstration.

26. Prepare and give a sales demonstration.

SALES TECHNIQUES
UNIT I

ANSWERS TO TEST

1.

a.	4	f.	5
b.	7	g.	1
c.	3	h.	2
d.	6	i.	10
e.	8	j.	9

2. Any six of the following:

   a. Prospecting
   b. Conducting sales interviews
   c. Closing sales
   d. Servicing
   e. Following-up
   f. Handling complaints
   g. Administering credit programs
   h. Performing other duties common to other employees

3. All are true

4.

a.	4	h.	9
b.	7	i.	12
c.	10	j.	1
d.	2	k.	8
e.	6	l.	5
f.	13	m.	11
g.	3		

5. b, c, d, g, h

6. b, c, d, f, g, h

7. a. Why should I buy
   b. What type, brand, or style should I buy
   c. Where should I buy
   d. How much should I buy
   e. When should I buy

8. a. Excuse — Customer gives an inadequate or false reason for not buying which may be caused by uncertainty or inability to make a decision

   b. Objection — An actual adverse opinion that a customer has about a product because customer does not understand, does not believe part of sales person's explanation and demonstration, is confused about a feature, missed part of demonstration, or is trying to justify paying the price

ANSWERS TO TEST

9. a. Confidence
   b. Sales resistance
   c. Lively
   e. Promotion

10. a, b, c, e, f, h

11. a. Facts
    b. Buy the product
    c. Benefits
    d. Positive
    e. Demonstrate

12. a, b, e, f, g, h

13. Any six of the following:

    a. Family and friends
    b. Present customers
    c. Inactive accounts
    d. Phone directory
    e. Newspapers
    f. Trade directories
    g. City permits
    h. Personal observation

14. a. 5
    b. 1
    c. 3
    d. 2
    e. 4

15. a. Attention
    b. Interest
    c. Desire
    d. Conviction
    e. Action

16. a. Do
    b. Do
    c. Do
    d. Don't
    e. Do
    f. Don't
    g. Don't
    h. Do
    i. Do
    j. Don't

17. a, b, c, d, e, g

ANSWERS TO TEST

18.	a.	Don't	h.	Do
	b.	Do	i.	Do
	c.	Do	j.	Don't
	d.	Do	k.	Don't
	e.	Don't	l.	Don't
	f.	Don't	m.	Do
	g.	Don't	n.	Do

19. b, c, d, g

20.-26. Evaluated to the satisfaction of the instructor

ADVERTISING

UNIT II

UNIT OBJECTIVE

After completion of this unit, the student should be able to complete a list of objectives of advertising, match major advertising media with their advantages/disadvantages, and identify major parts of an advertising layout. The student should also be able to prepare an advertising schedule, prepare a newspaper advertisement, and write and record a radio spot announcement. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to advertising with their correct definitions.
2. Complete a list of objectives of advertising.
3. Select advantages and disadvantages of advertising.
4. Match major advertising media with their advantages/disadvantages.
5. Match supplementary forms of advertising media with their correct definitions.
6. Select factors to consider in selecting advertising media.
7. Complete a list of requirements of effective advertising.
8. Select true statements concerning benefits of advertising.
9. List four factors to consider in determining when to advertise.
10. Identify major parts of an advertising layout.
11. Complete a list of procedures for preparing a newspaper advertisement.

OBJECTIVE SHEET

12. Select true statements concerning layout techniques.
13. Select characteristics of good copy.
14. List career opportunities in advertising.
15. Prepare an advertising schedule.
16. Prepare a newspaper advertisement.
17. Write and record a radio spot announcement.

ADVERTISING
UNIT II

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information and assignment sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Arrange for a field trip to and/or guest speakers from the following: advertising agency, newspaper office, radio station, television station, and outdoor advertising.

VII. Have students collect agribusiness ads and prepare a bulletin board using those ads which have good elements of design.

VIII. Cut parts of ads such as headlines and illustrations out of newspapers and magazines for students to arrange in pleasing ad layouts.

IX. Have students select and critique a newspaper ad for an area agribusiness. Have them point out what they liked/disliked about the ad. Then have students redo the ad to improve on the existing one.

X. Provide local advertising rate cards and assist students in figuring the cost of an ad.

XI. Have students collect data on approximate cost of each of the major types of advertising media. Discuss with class and compare benefits of each type of media with their cost.

XII. Select ads which use formal and informal balance and discuss the various ways to present major elements of an ad with students.

XIII. Have students develop an advertising campaign around an FFA fundraising activity to include a newspaper ad, direct mail piece, radio commercial, and display.

XIV. Provide students with a tape recorder and tape cassettes for use in Assignment Sheet #2.

XV. Have students collectively prepare a direct mail piece to promote an FFA fundraising project or agricultural product.

XVI. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

  A. Objective sheet

  B. Information sheet

  C. Transparency masters

    1. TM 1 — Major Parts of an Advertising Layout

    2. TM 2 — Balance

  D. Assignment sheets

    1. Assignment Sheet #1 — Prepare an Advertising Schedule

    2. Assignment Sheet #2 — Prepare a Newspaper Advertisement

    3. Assignment Sheet #3 — Write and Record a Radio Spot Announcement

  E. Test

  F. Answers to test

II. References:

  A. Samson, Harland E. *Advertising Planning and Techniques*. Cincinnati, OH: South-Western Publishing Co., 1979.

  B. McGuire, James E. *Advertising and Display in Agribusiness*. New York: McGraw-Hill Book Co., 1979.

  (NOTE: An activity guide is available for purchase with the text.)

  C. Wingate, John W. and Carroll A. Nolan. *Fundamentals of Selling*. Tenth Edition. Cincinnati, OH: South-Western Publishing Co., 1976.

  D. Wray, Ralph D. *Advertising Services*. New York: Gregg Division, McGraw-Hill Book Co., 1979.

  E. Carlile Robert. *Agriculture Sales and Service*. Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

  F. Nelson, Frank W. *Distributive Education II*. Stillwater, OK: Oklahoma Curriculum and Instructional Materials Center, 1976.

ADVERTISING
UNIT II

INFORMATION SHEET

I. **Terms and definitions**

A. Advertisement (ad) — A paid announcement that informs and educates consumers so that they may choose more wisely from the variety of goods and services now on the market

B. Advertising budget — Estimate of the amount of money to be spent on advertising during the year; usually based upon a percentage of last years sales

C. Advertising schedule — A written plan, based on a set amount of time, which indicates when advertisements are scheduled to appear.

(NOTE: An advertising schedule should be developed for a minimum of six months and should be based on the established sales goals of a business.)

D. Balance — To equalize the weight of the illustrations and content in an advertisement

E. Formal balance — Elements are spaced evenly on both sides in an ad

F. Informal balance — Elements are not spaced the same on both sides, but appear balanced by varying the sizes, shapes, and spacing in the ad

G. Institutional advertising — Promoting a business as a good place to buy because it measures up to certain standards

Example: Service advertising which may promote such things as credit, delivery, parking

H. Layout — The arrangement of elements that will appear in the finished advertisement

I. Leader — An item of timely interest that is competitively priced to draw customers into the store

J. Logotype — An identifying symbol of a business which is used for advertising

K. Media — The ways to reach people through advertising

L. Optical center — Spot slightly above and to the left of the precise center of the layout space

INFORMATION SHEET

M. Personal selling — The presentation of goods or services on a personal or face-to-face basis

(NOTE: Advertising and personal selling are partners in business promotion since advertising brings people into the store so that the salesperson can sell the product

N. Prime time — Time when the largest number of people listen to the radio or watch television and, thus, the time when it is most expensive to advertise

(NOTE: The size of a broadcast area will also affect the cost.)

O. Promotion — Coordination of all seller-initiated efforts to establish communication with potential customers

P. Promotional advertising — A form of advertising which is used to convince people to buy specific goods and services in a particular business

Q. Publicity — Any nonpaid coverage of a store or product by the media

R. Spot announcement — A brief selling message delivered between sponsored programs which lasts from 10 to 60 seconds

(NOTE: The main advantage of using spot announcements is that they allow frequent repetition of the sales message.)

S. Typeface — The design or shape of the letters used in printing a headline or the copy of an ad

II. Objectives of advertising

A. To attract *attention* of prospective buyers

B. To create a strong *interest* of the prospect in the product

C. To build a strong *desire* for the product

D. To motivate buying *action*

E. To keep buyers satisfied

III. Advantages and disadvantages of advertising

A. Advantages

1. It quickly gains attention

INFORMATION SHEET

2. It reaches individuals at a much lower cost per person than in personal selling

3. Content can be controlled by the business

B. Disadvantages

1. It is nonpersonal in nature

2. It cannot answer all questions about a product or service

IV. **Major advertising media and their advantages/disadvantages**

(NOTE: The most effective sales promotion is one in which a local business coordinates its advertising with the promotions done by manufacturers and suppliers. It is also important to remember that it is advertising which pays for television, radio, newspapers, and magazines.)

A. Newspaper

1. Advantages

a. Is widely read

b. Is relatively inexpensive

c. Can be changed quickly

2. Disadvantage — Has a short reading life

(NOTE: A newspaper does not usually lay around long.)

B. Magazine

1. Advantages

a. Adds prestige to a product or business

b. Can get effective use of color

c. Has a long reading life

d. May reach a select audience

Examples: *Progressive Farmer*
Hog Farmer

        e. Is a good medium for educating consumers about a product or service

    2. Disadvantages

        a. Is relatively expensive

        b. May waste circulation unless business's trading area is quite large

        c. Is not easy to change on short notice

C. Direct mail

    1. Advantages

        a. Has direct and personal appeal to one group

        b. May be used to make immediate sales by enclosing an order blank

        c. Is relatively inexpensive if special postal rates can be obtained

    2. Disadvantages

        a. Requires that the mailing list be constantly revised

        b. May be ignored by some people as merely "junk" mail

D. Radio

    1. Advantages

        a. Suited for products of general demand because of large diversified audience

        b. Can be changed easily

        c. Can be repeated frequently

        d. Is relatively inexpensive

    2. Disadvantages

        a. May waste coverage on many people who are not potential customers

INFORMATION SHEET

        b. Is not suited for products that must be seen to develop customer interest

    E. Television

        1. Advantages

            a. Has a large diversified audience

            b. Is good for national advertising

            c. Adds prestige to a product or business

            d. Is easy to show demonstration of a product

        2. Disadvantage — Is expensive

V. **Supplementary forms of advertising media and their definitions**

A. Shopping news — Newspaper consisting mainly of advertisements and usually distributed free of charge

(NOTE: They may be picked up in local businesses, mailed, or placed inside the regular newspaper.)

B. Car-card advertising — Advertising placed in busses, on taxis, in airports, and on the sides of automobiles

C. Outdoor advertising — Billboards, posters, painted walls, and electrical signs

D. Directory advertising — Ad placed in the yellow pages of telephone directories covering the shopping areas

E. Program advertising — Advertising which is done mainly as a public service or charity since few sales are generated by this type of advertising

Examples: Yearbook, concert program

F. Specialty advertising — Free item with the business's name on it; given to create goodwill, gain the customer's attention, and keep the business's name in the customers' minds

Examples: Ink pens, calenders

G. Catalog — Publication printed on a regular basis by mail order companies or on special occasions for a particular store or company

Examples: NASCO, Tractor Supply

INFORMATION SHEET

VI. **Factors to consider in selecting advertising media**

A. How many people will be reached and what is the cost per prospect

B. Can selling message be repeated

C. Does the media create attention, interest, desire, and action

D. Does media fit store's image

E. Will media reach market area desired

F. Is media flexible for copy changes

G. Can store afford to advertise in selected media

VII. **Requirements of effective advertising**

A. To advertise the right goods or services

B. To advertise at the right time

C. To advertise to the right market

D. To advertise in the right media

E. To use the right advertising technique

VIII. **Benefits of advertising**

A. Advertising increases demand

B. Increased demand results in more consumption of the product

C. With greater consumption, there is a need for increased production

D. As production is increased, the cost per unit is decreased

IX. **Factors to consider in determining when to advertise**

A. Advertise to support sales objectives for special events

B. Advertise to promote items which are seasonal

C. Advertise on a regular basis to keep customers thinking about business and products which are offered

(NOTE: Failure to advertise on a regular basis may result in loss of business to competitors.)

INFORMATION SHEET

D. Advertise as a result of unusual events which may generate additional sales

Examples: Heat wave, snow storm

X. **Major parts of an advertising layout** (Transparency 1)

A. Headline

B. White space

C. Border

D. Subhead

E. Illustration

F. Copy

G. Price

H. Logotype

XI. **Procedures for preparing a newspaper advertisement**

(NOTE: These procedures may also apply to ads appearing in other publications such as magazines, brochures and catalogs.)

A. Select product or products which are to be advertised

B. Collect facts about the product

Examples: Brand names, construction, benefits

C. Check on availability of product

D. Select a headline that is noticeable

E. Select proper illustrations that will draw attention

F. Write body copy

G. Determine selling price

H. Prepare a rough layout for art department to follow

I. Send to newspaper for final preparation

(NOTE: Final art and pasteup will generally be completed by the art department for the newspaper.)

INFORMATION SHEET

XII. **Layout techniques**

A. Provide a design flow which directs the eye from the top to bottom of the ad

(NOTE: Patterns such as an S pattern, C pattern, Z pattern, and backward S, C, and Z patterns are frequently used.)

B. Balance the elements in the ad, placing the most important element near the optical center (Transparency 2)

(NOTE: There are two types of balance in an ad; formal and informal.)

C. Place the headline immediately above the main copy block

(NOTE: Don't separate copy from headline.)

D. Keep copy to a minimum and present it in an easy to read format

E. Select a typeface which is distinctive and can be used regularly to reflect a store's personality

F. Use one large illustration to attract reader rather than several smaller ones

G. Use sensible proportions; most ads are deeper than they are wide

H. Use white space to increase readability of copy and to create a visual flow through the ad

I. Select borders with a simple design to set ad off from other areas of the page

(NOTE: Remember, the advertiser will not know in advance what the adjoining copy or ads will look like. Borders will keep the advertisement from being dominated by other ads.)

J. Use color when possible

K. Review layout as if you were the customer to determine the effectiveness of the ad; make changes as necessary

XIII. **Characteristics of good copy**

(NOTE: Read the ad as a customer who has never seen the ad before. Then ask yourself, "Is it too wordy and do the sentences follow a logical order?")

A. Gives the reason for buying the product (buying motives and customer benefits)

INFORMATION SHEET

B. Gives the reason for shopping in the store

C. Urges the reader to buy now

Examples: "Limited supply"
"This week only"
"Enclosed coupons"

D. Avoids cliches

Examples: "Tried and true"
"Last but not least"

E. Avoids abbreviations

F. Uses specific descriptions

Examples: Don't say you're easy to get to, show a map
Don't say you have the best brands, list them

G. Includes important store information

Examples: Address, telephone number, credit cards accepted, free parking

H. Sounds enthusiastic

I. Is informative

J. Is fun to read

K. Does not use too many kinds of typeface

L. Uses mostly complete sentences

M. May begin with bold letters

XIV. **Career opportunities in advertising**

(NOTE: In many small agribusinesses, the salesperson is often called on to assist in selecting products for advertising and in writing copy for ads.)

A. Salesperson

B. Artist's assistant

C. Photographer's assistant

INFORMATION SHEET

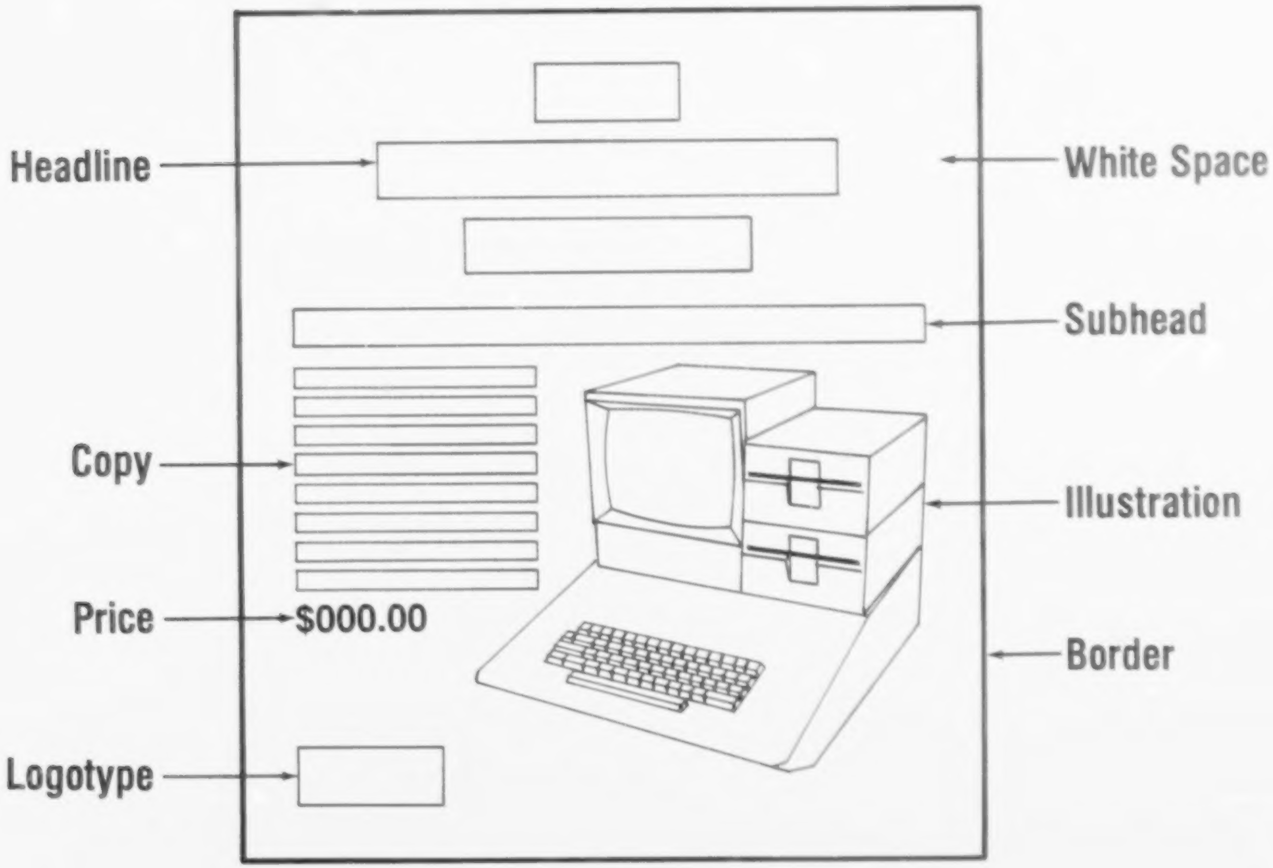
D. Marketing research assistant

E. Copywriter

F. Commercial announcer

G. Executive secretary or director

Major Parts of an Advertising Layout



Headline

White Space

Subhead

Copy

Illustration

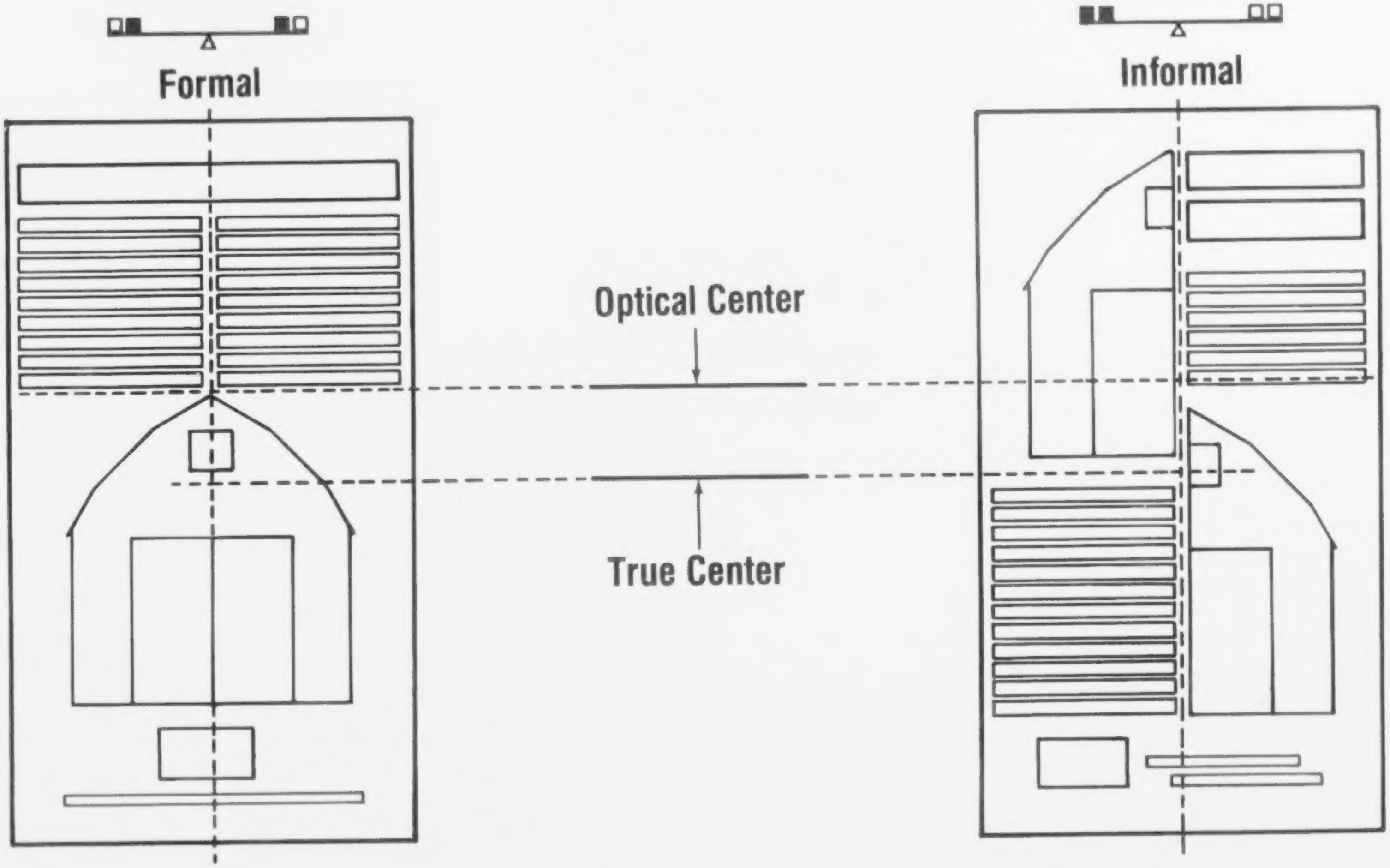
Price

$000.00

Border

Logotype

Balance



Formal

Informal

Optical Center

True Center

ADVERTISING
UNIT II

ASSIGNMENT SHEET #1 — PREPARE AN ADVERTISING SCHEDULE

Directions: Use the information provided below and the form on the following page to complete this assignment.

Bill's Farm and Garden Supply in YourTown, YourState, needs an advertising schedule to help meet sales objectives for January through June. $6,000 has been budgeted for advertising in the local newspaper and on the local radio station and for any additional promotions such as direct mail pieces. Keeping in mind the amount to be spent for the six-month period, the type of business, and the type of customers who shop at Bill's Farm and Garden Supply, prepare an advertising schedule which identifies sales events, sale items, and types of media to be used each month.

Items which have been popular in the past include: garden weed killer, water hoses, lawn sprinklers, fertilizer, lawn clean-up bags, wheel barrows, store brand dog food, lawn mowers, show supplies for steers and horses, children's toy tractors, pruning shears, and watering pans. This year, Bill has added the following items to his inventory: new line of riding lawn mowers (EZ Rider), fence materials, portable buildings, and grass sod.

(NOTE: Refer to objective IX in the information sheet to review factors to be considered in determining when to advertise. Also, refer to agribusiness ads which have been displayed and discussed in class for additional ideas of items and themes to include in schedule.)

ASSIGNMENT SHEET #1

Advertising Schedule

Business ______________________________

Advertising Period ______________________________

Advertising Budget ______________________________

MONTH	SALES EVENTS (Holidays, Promotions)	SALE ITEMS	TYPES OF MEDIA
JANUARY			
FEBRUARY			
MARCH			
APRIL			
MAY			
JUNE			

ADVERTISING
UNIT II

ASSIGNMENT SHEET #2 — PREPARE A NEWSPAPER ADVERTISEMENT

Directions: Select an FFA fund-raising project or common agricultural product and prepare a newspaper advertisement to promote that product. The ad must contain all of the major parts of a layout and meet the objectives of advertising.

(NOTE: Review objectives pertaining to newspaper advertising which are found in the information sheet in this unit.)

ADVERTISING
UNIT II

ASSIGNMENT SHEET #3 — WRITE AND RECORD A RADIO SPOT ANNOUNCEMENT

Directions: Now that you have prepared a newspaper advertisement for an FFA fund-raising project or common agricultural product, write and record a 20-second radio spot announcement (about 40 words) using the information presented in the ad. Remember that the message must get the listener's attention fast and be easy for the listener to follow. Also, repeat important facts and use descriptive words which form pictures in the listener's mind. As with all forms of advertising, your main objectives are to attract attention, create interest, build a strong desire for the product, motivate buying action, and keep buyers satisfied.

(NOTE: Check with your instructor about using a recorder and cassette tape to record your spot announcement.)

ADVERTISING
UNIT II

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. A brief selling message delivered between sponsored programs which lasts from 10 to 60 seconds

_____b. Any nonpaid coverage of a store or product by the media

_____c. To equalize the weight of the illustrations and content in an advertisement

_____d. Estimate of the amount of money to be spent on advertising during the year; usually based upon a percentage of last years sales

_____e. The ways to reach people through advertising

_____f. An identifying symbol of a business which is used for advertising

_____g. Spot slightly above and to the left of the precise center of the layout space

_____h. The design or shape of the letters used in printing a headline or the copy of an ad

_____i. Elements are not spaced the same on both sides, but appear balanced by varying the sizes, shapes, and spacing in the ad

_____j. The arrangement of elements that will appear in the finished advertisement

_____k. Elements are spaced evenly on both sides in an ad

_____l. A form of advertising which is used to convince people to buy specific goods and services in a particular business

1. Leader
2. Prime time
3. Formal balance
4. Promotion
5. Media
6. Balance
7. Layout
8. Spot announcement
9. Informal balance
10. Logotype
11. Institutional advertising
12. Publicity

TEST

______m. Promoting a business as a good place to buy because it measures up to certain standards

______n. Time when the largest number of people listen to the radio or watch television and, thus, the time when it is most expensive to advertise

______o. A paid announcement that informs and educates consumers so that they may choose more wisely from the variety of goods and services now on the market

______p. The presentation of goods or services on a personal or face-to-face basis

______q. Coordination of all seller-initiated efforts to establish communication with potential customers

______r. An item of timely interest that is competitively priced to draw customers into the store

______s. A written plan, based on a set amount of time, which indicates when advertisements are scheduled to appear

13. Personal selling
14. Advertisement
15. Advertising budget
16. Promotional advertising
17. Optical center
18. Advertising schedule
19. Typeface

2. Complete the following list of objectives of advertising.

a. To attract ______________________ of prospective buyers

b. To create a strong ______________________ of the prospect in the product

c. To build a strong ______________________ for the product

d. To motivate buying ______________________

e. To keep buyers ______________________

3. Select advantages and disadvantages of advertising by placing an "X" in the appropriate blanks.

a. Advantages

______1) It reaches individuals at a much lower cost per person than in personal selling

______2) Content cannot be controlled by the business

______3) It quickly gains attention

b. Disadvantages

______1) It is personal in nature

______2) It cannot answer all questions about a product or service

TEST

4. Match major advertising media on the right with their advantages/disadvantages.

______a. 1) Advantages — Adds prestige to a product or business; can get effective use of color; has a long reading life; may reach a select audience

2) Disadvantages — Is relatively expensive; may waste circulation unless business's trading area is quite large; is not easy to change on short notice

______b. 1) Advantages — Has direct and personal appeal to one group; is relatively inexpensive if special postal rates can be obtained

2) Disadvantages — Requires that the mailing list be constantly reused; may be ignored by some people as merely "junk" mail

______c. 1) Advantages — Has a large diversified audience; is good for national advertising; is easy to show demonstration of a product

2) Disadvantage — Is expensive

______d. 1) Advantages — Is widely read; is relatively inexpensive; can be changed quickly

2) Disadvantage — Has a short reading life

______e. 1) Advantages — Suited for products of general demand because of large diversified audience; can be changed easily; can be repeated frequently; is relatively inexpensive

2) Disadvantages — May waste coverage on many people who are not potential customers; is not suited for products that must be seen to develop customer interest

1. Newspaper
2. Magazine
3. Direct mail
4. Radio
5. Television

TEST

5. Match supplementary forms of advertising on the right with their correct definitions.

______a. Ad placed in the yellow pages of telephone directories covering the shopping areas

______b. Billboards, posters, painted walls, and electrical signs

______c. Newspaper consisting mainly of advertisements and usually distributed free of charge

______d. Advertising placed in busses, on taxis, in airports, and on the sides of automobiles

______e. Advertising which is done mainly as a public service or charity since few sales are generated by this type of advertising

______f. Publication printed on a regular basis by mail order companies or on special occasions for a particular store or company

______g. Free item with the business's name on it; given to create goodwill, gain the customer's attention, and keep the business's name in the customers' minds

1. Catalog
2. Program advertising
3. Outdoor advertising
4. Specialty advertising
5. Directory advertising
6. Shopping news
7. Car-card advertising

6. Select factors to consider in selecting advertising media by placing an "X" in the appropriate blanks.

______a. How many people will be reached and what is the cost per prospect

______b. Does the media fit store's image

______c. Can selling message be repeated

______d. Will media reach more than desired market area

______e. Is media flexible for copy changes

______f. Can store afford to advertise in selected media

7. Complete the following list of requirements of effective advertising.

a. To advertise the right ______________________ or ______________________

b. To advertise at the right ______________________

TEST

c. To advertise to the right ____________________

d. To advertise in the right ____________________

e. To use the right ____________________

8. Select true statements concerning benefits of advertising by placing an "X" in the appropriate blanks.

_____a. Advertising increases demand

_____b. Increased demand results in more consumption of the product

_____c. With greater consumption, there is a need for decreased production

_____d. As production is decreased, the cost per unit is decreased

9. List four factors to consider in determining when to advertise.

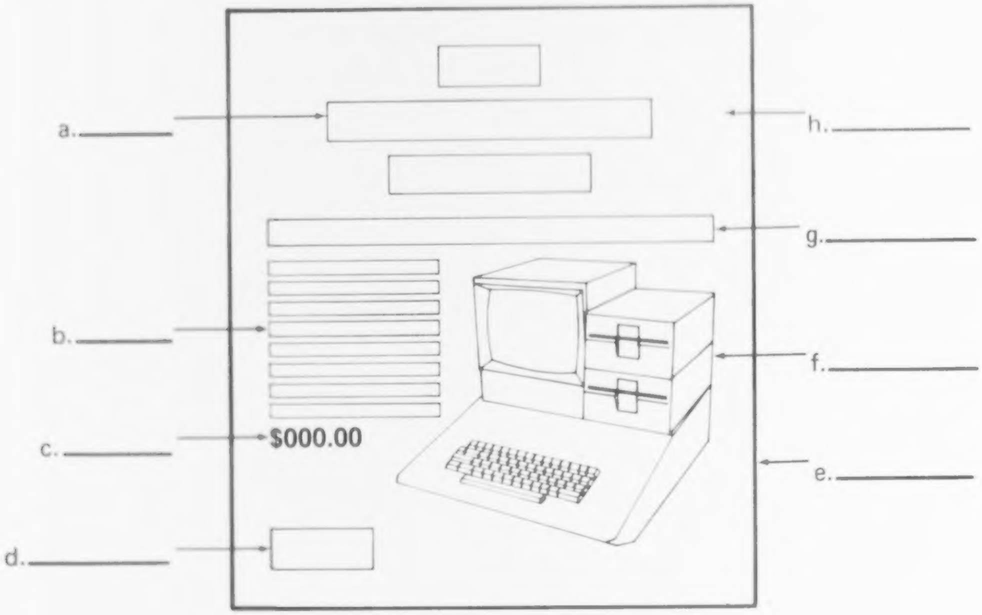
a. ____

b. ____

c. ____

d. ____

10. Identify major parts of an advertising layout.



TEST

11. Complete the following list of procedures for preparing a newspaper advertisement.

a. Select product or products which are to be advertised

b. Collect ____________________ about the product

c. Check on ____________________ of product

d. Select a headline that is ____________________

e. Select proper ____________________ that will draw attention

f. Write ____________________

g. Determine selling price

h. Prepare a ____________________ for art department to follow

i. Send to newspaper for final preparation

12. Select true statements concerning layout techniques by placing an "X" in the appropriate blanks.

______a. Provide a design flow which directs the eye from the bottom to top of the ad

______b. Balance the elements in the ad, placing the most important element near the optical center

______c. Place the illustration immediately above the main copy block

______d. Use several small illustrations to attract a reader rather than one large illustration

______e. Keep copy to a minimum and present it in an easy to read format

______f. Use white space to increase readability of copy and to create a visual flow through the ad

______g. Select borders with a detailed design to set ad off from other areas of the page

13. Select characteristics of good copy by placing an "X" in the appropriate blanks.

______a. Gives the reason for buying the product

______b. Urges the reader to buy now

______c. Avoids specific descriptions

______d. Includes important store information

______e. Uses many kinds of typeface

TEST

_____f. Uses mostly incomplete sentences

_____g. May begin with bold letters

14. List five career opportunities in advertising.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

15. Prepare an advertising schedule.

16. Prepare a newspaper advertisement.

17. Write and record a radio spot announcement.

ADVERTISING
UNIT II

ANSWERS TO TEST

1.

a.	8	h.	19	o.	14
b.	12	i.	9	p.	13
c.	6	j.	7	q.	4
d.	15	k.	3	r.	1
e.	5	l.	16	s.	18
f.	10	m.	11		
g.	17	n.	2		

2. a. Attention
   b. Interest
   c. Desire
   d. Action
   e. Satisfied

3. a. 1, 3
   b. 2

4. a. 2
   b. 3
   c. 5
   d. 1
   e. 4

5.

a.	5	e.	2
b.	3	f.	1
c.	6	g.	4
d.	7		

6. a, b, c, e, f

7. a. Goods, services
   b. Time
   c. Market
   d. Media
   e. Advertising technique

8. a, b

9. a. Advertise to support sales objectives for special events
   b. Advertise to promote items which are seasonal
   c. Advertise on a regular basis to keep customers thinking about business and products which are offered
   d. Advertise as a result of unusual events which may generate additional sales

ANSWERS TO TEST

10. a. Headline
    b. Copy
    c. Price
    d. Logotype
    e. Border
    f. Illustration
    g. Subhead
    h. White space

11. b. Facts
    c. Availability
    d. Noticeable
    e. Illustrations
    f. Body copy
    h. Rough layout

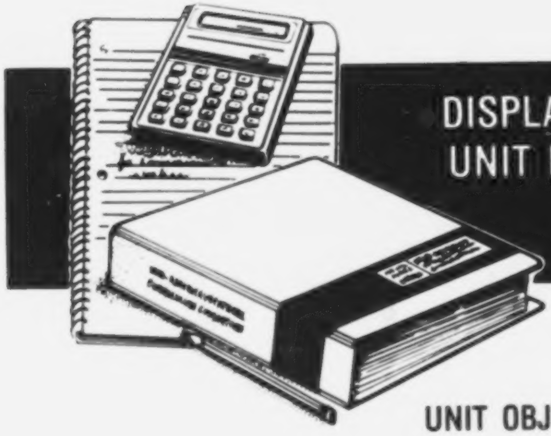
12. b, e, f

13. a, b, d

14. Any five of the following:

    a. Salesperson
    b. Artist's assistant
    c. Photographer's assistant
    d. Marketing research assistant
    e. Copywriter
    f. Commercial announcer
    g. Executive secretary or director

15.-17. Evaluated to the satisfaction of the instructor



DISPLAY
UNIT III

UNIT OBJECTIVE

After completion of this unit, the student should be able to list functions of a display and types of displays, select basic display arrangements, plan a display, and construct a display. This knowledge will be evidenced by correctly performing the procedures outlined in the assignment and job sheets and by scoring 85 percent on the unit test.

SPECIFIC OBJECTIVES

After completion of this unit, the student should be able to:

1. Match terms related to display with their correct definitions.
2. List six functions of a display.
3. Select advantages of displays.
4. List three types of displays.
5. Identify basic display arrangements.
6. Complete a list of locations for interior displays.
7. Match elements of good display design with their characteristics.
8. Select principles of display design.
9. List common display materials.
10. Complete a list of functions of a show card.
11. Complete a list of statements concerning the procedure for planning and creating a display.
12. Select true statements concerning guidelines in setting up interior displays.

OBJECTIVE SHEET

13. Complete a list of ways to maintain a display.
14. Select career opportunities in display.
15. Plan a display.
16. Demonstrate the ability to construct a display.

DISPLAY
UNIT III

SUGGESTED ACTIVITIES

I. Provide students with objective sheet.

II. Provide students with information, assignment, and job sheets.

III. Make transparencies.

IV. Discuss unit and specific objectives.

V. Discuss information and assignment sheets.

VI. Demonstrate and discuss procedures outlined in the job sheet.

VII. Take a field trip to view displays in an agribusiness.

VIII. Invite a guest speaker from a local store to discuss display principles.

IX. Have students evaluate displays in area agribusinesses. They should note their location and their use of design elements. Have students write a brief description of one they liked and one they disliked, have them explain why, and then make recommendations on how they would improve the display they disliked.

X. Obtain a color wheel and explain the importance of color used in a display to class.

XI. Assignment Sheet #1, "Plan a Display", and Job Sheet #1, "Construct a Display", have been prepared as a joint activity. Have students complete Assignment Sheet #1 first so that they can use their display plan to complete Job Sheet #1.

XII. Provide students with materials needed to complete Job Sheet #1.

XIII. Give test.

INSTRUCTIONAL MATERIALS

I. Included in this unit:

   A. Objective sheet

   B. Information sheet

   C. Transparency masters

      1. TM 1 — Basic Display Arrangements

      2. TM 2 — How to Construct a Display

INSTRUCTIONAL MATERIALS

D. Assignment Sheet #1 — Plan a Display

E. Job Sheet #1 — Construct a Display

F. Test

G. Answers to test

II. References:

A. McGuire, James E. *Advertising and Display in Agribusiness.* New York: McGraw-Hill Book Co., 1979.

(NOTE: An activity guide is available for purchase with the text.)

B. Samson, Harland E. and Wayne G. Little. *Display Planning and Techniques.* Cincinnati, OH: South-Western Publishing Co., 1979.

C. Fuda, George E. and Edwin L. Nelson. *The Display Specialist.* New York: McGraw-Hill Book Co., 1976.

D. Carlile, Robert. *Agriculture Sales and Service.* Stillwater, OK: Mid-America Vocational Curriculum Consortium, 1976.

E. Nelson, Frank W. *Distributive Education II.* Stillwater, OK: Oklahoma Curriculum and Instructional Materials Center, 1976.

DISPLAY
UNIT III

INFORMATION SHEET

I. **Terms and definitions**

A. Balance — The arrangement of a display so that equal attention is given to all items and parts of the display

B. Display - The art of communicating with people visually in order to get their attention so that they will consider the purchase of a product

C. Display sketch — The blueprint which shows what it will look like and what is needed to assemble the display

(NOTE: A sketch should indicate size, shape, and distance of all items.)

D. Formal balance — Elements spaced evenly on both sides of a display

E. Informal balance — Elements of a display not spaced the same on both sides but which appear balanced by varying the distance of larger, heavier elements, various shapes, and colors

F. Prop — Fixture used to build a display

G. Radiation display — Arrangement of products so that they radiate out from the center

H. Show cards — Signs used in displays to give information about the featured merchandise

II. **Functions of a display**

A. To promote immediate sales

B. To promote additional sales

C. To promote future sales

D. To establish and maintain a business's image

E. To promote confidence and goodwill

F. To educate the public

III. **Advantages of displays**

A. Involve real merchandise that can be examined by customers

INFORMATION SHEET

B. Can be relatively inexpensive for a store to have

C. Can be changed easily to reflect trends

D. Can support advertising as part of a total promotional effort

E. Can help customers make buying decision

IV. **Types of displays**

A. Window

  1. Open
  2. Closed
  3. Semi-closed

B. Interior

  1. Open
  2. Closed
  3. Platform
  4. Ledge and wall
  5. Architectural

C. Outside

Examples: Farm machinery, portable signs

V. **Basic display arrangements** (Transparency 1)

A. Stair step

B. Pyramid

C. Zig zag

D. Repetition

E. Radiation

F. Dump

INFORMATION SHEET

VI. Locations for interior displays

A. Area just inside front door

(NOTE: Place slow moving items to the right of front door.)

B. Ends of aisles

C. In area where items are normally sold

D. Opposite service counters

E. Checkout counters

F. Back of store

(NOTE: The least valuable space is at the back of a store and heavy demand items should be placed there.)

VII. Elements of good display design

A. Line — Calls attention to parts of the display to create harmony; directs eye through display

B. Shape — Physical appearance of items in a display; a variety of shapes are used in the backgrounds and arrangements for props, and as containers

C. Size — Can create special effects through contrast by using different sized items

(NOTE: The size of objects presented in a display should be in proportion to each other.)

D. Weight — The impression of weight created by the appearance of the display, and is affected by line, shape, size, color, and texture

E. Texture — The look or feel of the surface of an item; can be real or imagined

F. Color — Affects customer's buying mood; attracts customers to display

(NOTE: Too many colors in one display can confuse and even annoy a customer. Only one color should be dominant in a display.)

VIII. Principles of display design

A. Balance

1. Formal

2. Informal

INFORMATION SHEET

B. Contrast

C. Emphasis

D. Harmony

E. Proportion

IX. **Common display materials**

A. Display board

B. Paint

C. Buildups

Examples: Steps, platforms, tables

D. Lumber

E. Paper

F. Fabric

G. Props

Examples: Shelves, artificial trees or flowers, columns

H. Show cards

I. Lights

Examples: Floodlights, spotlights

J. Hand and power tools

Examples: Scissors, hammer, staple gun, saw

X. **Functions of a show card**

A. To identify the product or idea

B. To show costs, manufacturer, uses, and/or benefits

C. To entice customers to buy

D. To give directions to location of products in store

INFORMATION SHEET

XI. **Procedure for planning and creating a display** (Transparency 2)

A. Set a budget for displays and know the specific cost of each planned display

B. Select a product or products

C. Develop an idea or theme

D. Sketch the display design

E. Select props

F. Collect display materials needed in construction

G. Construct the display

H. Make any necessary adjustments

(NOTE: Stand back and look at the display from all angles. View the display as a customer would.)

I. Maintain the display

XII. **Guidelines in setting up interior displays**

A. Design displays to show the products to their best advantage

B. Use high intensity lighting or strong contrasts in display elements such as color, shape, and size

C. Make sure display areas allow enough aisle space for customers to move freely about the store

D. Place displays perpendicular to the main traffic aisle rather than parallel so customers can stop and examine products without blocking traffic

E. Use space at the front of the store for products which demand special promotional effort

F. Use large bold figures on show cards when price is important or a point needs to be emphasized

G. Make sure arrangement of merchandise will allow customers to examine the product closely

INFORMATION SHEET

XIII. **Ways to maintain a display**

(NOTE: A checklist is a good way to maintain and improve displays.)

A. Turn on lights and mechanical objects used as part of display

B. Keep aisles around display area clean

C. Keep the display clean

Examples: Wash glass, dust props, sweep floor

D. Repair or replace parts that have been damaged

Examples: Oiling moving parts, touching up chips

E. Rearrange items that have fallen or been moved out of proper order

F. Rearrange display or make minor changes to give it a fresh appearance

(NOTE: This is particularly important if display is not attracting attention and promoting merchandise.)

G. Restock free handouts if appropriate

XIV. **Career opportunities in display**

(NOTE: In many small agribusinesses, the salesperson is often called on to assist in selecting products and preparing the displays.)

A. Salesperson

B. Sign painter's assistant

C. Display organizer

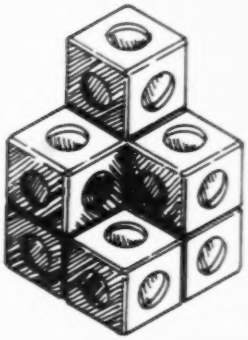
D. Demonstrator

E. Designer's assistant

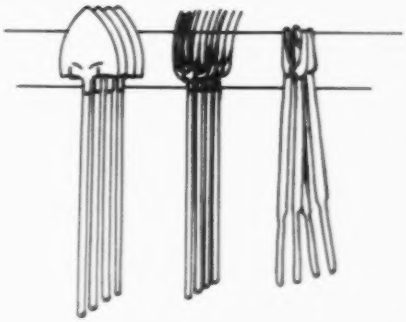
F. Booth attendant

G. Director

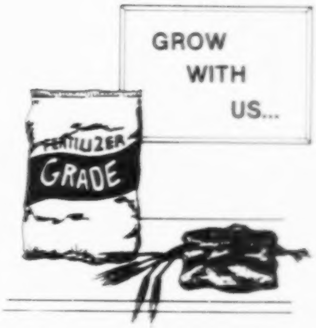
Basic Display Arrangements



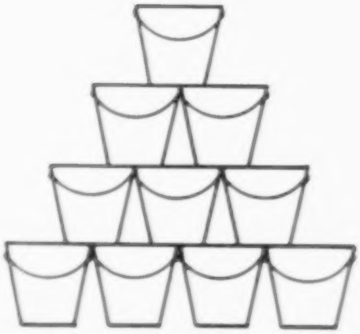
Stair Step



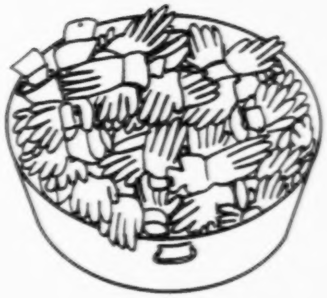
Repetition


GROW
WITH
US...
FERTILIZER
GRADE

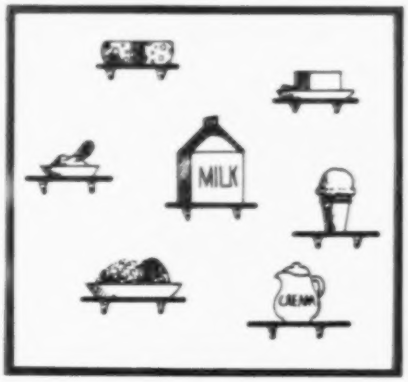
Zigzag



Pyramid

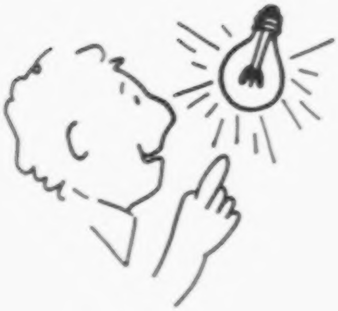


Dump

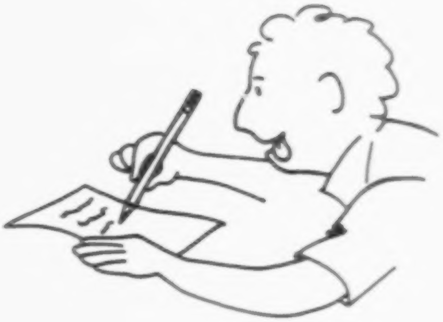


Radiation

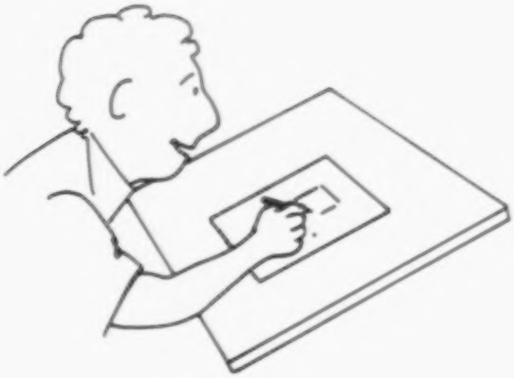
How to Construct a Display



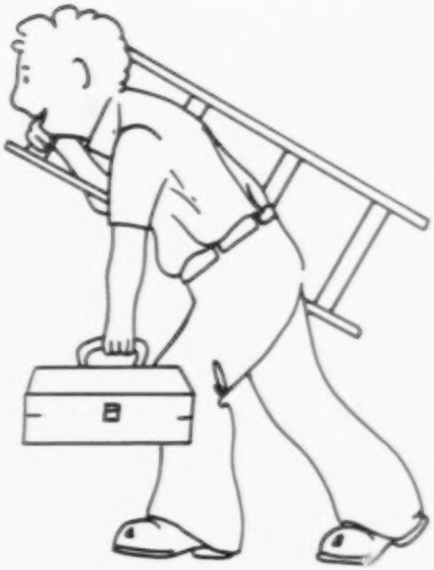
Idea



Planning



Sketching



Gathering Material

DISPLAY
UNIT III

ASSIGNMENT SHEET #1 — PLAN A DISPLAY

Directions: Using the information sheet in this unit as a guide, plan a display for an FFA fund raising project or agricultural product.

A. Name of product to be displayed ______________________________

B. Idea or theme ______________________________

C. Color scheme ______________________________

D. Desired location of display ______________________________

E. Display arrangement (stair step, zig zag, pyramid, etc.) ______________

F. Props to be used ______________________________

____

G. Materials needed for construction ______________________________

____

____

H. Display sketch

(NOTE: Use labels to indicate size, shape, and distance of items. Draw your sketch on the back of this page.)

DISPLAY
UNIT III

JOB SHEET #1 — CONSTRUCT A DISPLAY

I. Materials

(NOTE: Refer to your display plan prepared in Assignment Sheet #1 for a specific list of materials needed to construct the display.)

II. Procedure

A. Obtain a copy of the display plan

B. Assemble tools and materials according to plan

C. Build the basic foundation

(NOTE: Provide the necessary strength and safety to support display materials.)

D. Provide for utilities such as electricity to operate lights and motors used in display

(CAUTION: Keep wiring out of sight and place cords carefully to prevent someone from tripping or damaging the display.)

E. Cover background and flooring with designated materials such as paint, paper, drapes, and fabric

(NOTE: One person is usually needed to hold materials right while another staples materials in place.)

F. Position props according to plan and secure

(NOTE: Keep positioning until parts are displayed to best advantage.)

G. Add related accessories to provide realism

H. Position and secure show cards

(NOTE: Show cards should be placed where they can be easily read by a customer.)

I. Proofread the show cards and check the background and covering for any needed touchup

J. Evaluate display, checking it from several different angles, and make any necessary changes to make display more effective

DISPLAY
UNIT III

NAME ______________________

TEST

1. Match the terms on the right with their correct definitions.

_____a. Signs used in displays to give information about the featured merchandise

_____b. The arrangement of a display so that equal attention is given to all items and parts of the display

_____c. The blueprint which shows what it will look like and what is needed to assemble the display

_____d. The art of communicating with people visually in order to get their attention so that they will consider the purchase of a product

_____e. Fixture used to build a display

_____f. Elements of a display not spaced the same on both sides but which appear balanced by varying the distance of larger, heavier elements, various shapes, and colors

_____g. Elements spaced evenly on both sides of a display

1. Prop
2. Formal balance
3. Display
4. Balance
5. Show cards
6. Informal balance
7. Display sketch

2. List six functions of a display.

a. ____

b. ____

c. ____

d. ____

e. ____

f. ____

TEST

3. Select advantages of displays by placing an "X" in the appropriate blanks.

_____a. Involve real merchandise that can be examined by customers

_____b. Can be relatively inexpensive for a store to have

_____c. Can be changed easily to reflect trends

_____d. Can replace advertising as the total promotional effort

_____e. Can help customers make buying decision

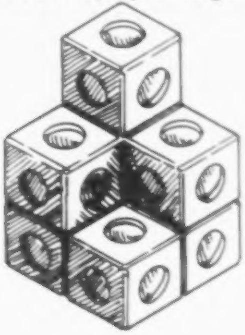
4. List three types of displays.

a. ____

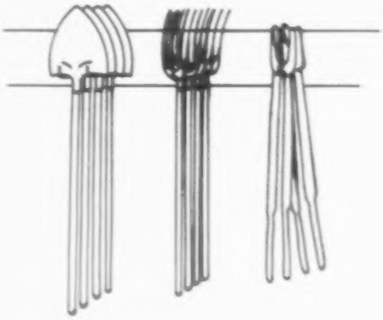
b. ____

c. ____

5. Identify basic display arrangements.

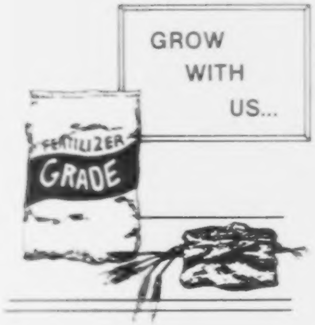


a. ______________________________

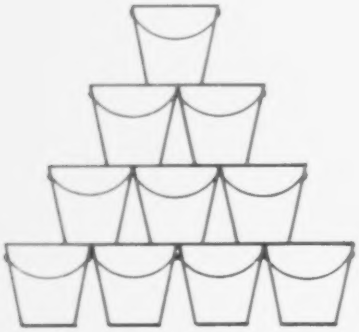


b. ______________________________

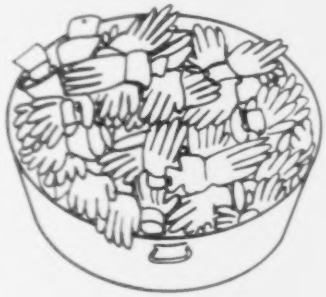
TEST


GROW
WITH
US...
FERTILIZER
GRADE

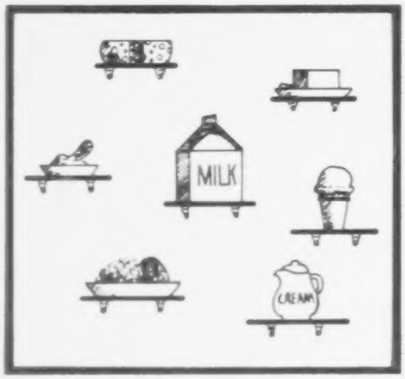
c. ______________________________



d. ______________________________



e. ______________________________



f. ______________________________

6. Complete the following list of locations for interior displays.

   a. Area just inside ____________________

   b. ____________________ of aisles

   c. Opposite ____________________ counters

   d. ____________________ counters

   e. ____________________ of store

TEST

7. Match elements of good display design on the right with their characteristics.

_____a. The impression of weight created by the appearance of the display, and is affected by line, shape, size, color, and texture

_____b. Can create special effects through contrast by using different sized items

_____c. Physical appearance of items in a display; a variety of shapes are used in the backgrounds and arrangements for props, and as containers

_____d. Calls attention to parts of the display to create harmony; directs eye through display

_____e. The look or feel of the surface of an item; can be real or imagined

_____f. Affects customer's buying mood; attracts customers to display

1. Shape
2. Color
3. Line
4. Size
5. Weight
6. Texture

8. Select principles of display design by placing an "X" in the appropriate blanks.

_____a. Balance

_____b. Proportion

_____c. Contrast

_____d. Harmony

_____e. Repetition

_____f. Emphasis

9. List eight common display materials.

a. ______________________________

b. ______________________________

c. ______________________________

d. ______________________________

e. ______________________________

TEST

f. ____

g. ____

h. ____

10. Complete the following list of functions of a show card.

    a. To ______________ the product or idea

    b. To show ______________, manufacturer, uses, and/or benefits

    c. To entice customers to ______________

    d. To give ______________ to location of products in store

11. Complete the following list of statements concerning the procedure for planning and creating a display.

    a. Set a ______________ for displays and know the specific cost of each planned display

    b. Select a product or products

    c. Develop an ______________ or ______________

    d. ______________ the display design

    e. Select ______________

    f. Collect display materials needed in construction

    g. ______________ the display

    h. Make any necessary adjustments

    i. ______________ the display

12. Select true statements concerning guidelines in setting up interior displays by placing an "X" in the appropriate blanks.

    _____a. Design displays to show the products to their best advantage

    _____b. Use soft lighting or contrasts in display elements such as color, shape, and size

    _____c. Make sure display areas allow enough aisle space for customers to move freely about the store

TEST

_____d. Place displays perpendicular to the main traffic aisle rather than parallel so customers can stop and examine products without blocking traffic

_____e. Use space at the back of the store for products which demand special promotional effort

_____f. Use large bold figures on show cards when price is important or a point needs to be emphasized

13. Complete the following list of ways to maintain a display.

    a. Turn on lights and mechanical objects used as part of a display

    b. ____

    c. ____

    d. ____

    e. Rearrange items that have fallen or been moved out of proper order

    f. Rearrange display or make minor changes to give it a fresh appearance

    g. Restock free handouts if appropriate

14. Select career opportunities in display by placing an "X" in the appropriate blanks.

    _____a. Display organizer

    _____b. Salesperson

    _____c. Sign painter's assistant

    _____d. Demonstrator

    _____e. Booth attendant

    _____f. Director

    _____g. Designer's assistant

(NOTE: If the following activities have not been accomplished prior to the test, ask your instructor when they should be completed.)

15. Plan a display.

16. Demonstrate the ability to construct a display.

DISPLAY
UNIT III

ANSWERS TO TEST

1. a. 5
   b. 4
   c. 7
   d. 3
   e. 1
   f. 6
   g. 2

2. a. To promote immediate sales
   b. To promote additional sales
   c. To promote future sales
   d. To establish and maintain a store's image
   e. To promote confidence and goodwill
   f. To educate the public

3. a, b, c, e

4. a. Window
   b. Interior
   c. Outside

5. a. Stair step
   b. Repetition
   c. Zig zag
   d. Pyramid
   e. Dump
   f. Radiation

6. a. Front door
   b. Ends
   c. Service
   d. Checkout
   e. Back

7. a. 5
   b. 4
   c. 1
   d. 3
   e. 6
   f. 2

8. a, b, c, d, f

ANSWERS TO TEST

9. Any eight of the following:

    a. Display board
    b. Paint
    c. Buildups
    d. Lumber
    e. Paper
    f. Fabric
    g. Props
    h. Show cards
    i. Lights
    j. Hand and power tools

10. a. Identify
    b. Costs
    c. Buy
    d. Directions

11. a. Budget
    c. Idea, theme
    d. Sketch
    e. Props
    g. Construct
    i. Maintain

12. a, c, d, f

13. b. Keep aisles around display area clean
    c. Keep the display clean
    d. Repair or replace parts that have been damaged

14. All are correct

15. Evaluated to the satisfaction of the instructor

16. Performance skills evaluated to the satisfaction of the instructor